

CAY ON HBL T74

90 M17

SEPT. 1990-

URBAN/MUNICIPAL

CITY OF HAMILTON
MARKETING STUDY OF A
PROPOSED HAMILTON
CRYSTAL PALACE



CITY OF HAMILTON

MARKETING STUDY

OF A PROPOSED HAMILTON CRYSTAL PALACE

SEPTEMBER 1990

Prepared by

Fox Jones & Associates

TABLE OF CONTENTS

Page

1.	INTRODUCTION	1
	1.1 BACKGROUND	1
	1.2 OBJECTIVES AND KEY ISSUES	1
	1.3 METHODOLOGY	3
2.	EXISTING FLORAL SHOWS AND FACILITIES IN THE HAMILTON REGION	5
	2.1 MUM SHOW	5
	2.2 ROYAL BOTANICAL GARDENS	7
3.	OVERVIEW OF HAMILTON'S DEMOGRAPHICS, ECONOMY AND TOURISM INDUSTRY	9
	3.1 POPULATION	9
	3.2 TOURISM	10
	3.3 OTHER MAJOR PUBLIC ATTRACTIONS IN HAMILTON	14
	3.4 LOCAL ECONOMY	14
4.	COMPARABLE FACILITIES IN OTHER CITIES	15
	4.1 INTRODUCTION	15
	4.2 BLOEDEL CONSERVATORY	15
	4.3 FUQUA CONSERVATORY	18
	4.4 CRYSTAL GARDEN	20
	4.5 ALLAN GARDENS	24
	4.6 SUMMARY AND CONCLUSIONS	26
5.	CRYSTAL PALACE	28
	5.1 INTRODUCTION	28
	5.2 DISCUSSION OF IMPACT OF EACH SHORT LIST SITE ON THE CONCEPT	28
	5.3 PERMANENT AND SEASONAL DISPLAYS	37
	5.4 PROJECTED ATTENDANCE	38
	5.5 PARKING	44
	5.6 ADMINISTRATION AND MANAGEMENT	45
	5.7 MARKETING	46
	5.8 PROJECTED OPERATING BUDGET	47
	5.9 CONCLUSIONS	51
6.	PROJECTED SOCIAL ECONOMIC IMPACT OF THE CRYSTAL PALACE	53

APPENDIX I:	CONTACT LIST
APPENDIX II:	ECONOMIC IMPACT MODEL

1. INTRODUCTION

1.1 BACKGROUND

A committee was formed in Hamilton in 1985 to consider the possibility of establishing a new home for the highly successful annual Mum Show. This show is currently held at Gage Park's nursery greenhouses and attracts between 30,000-40,000 visitors over a three week period in November. The name "Crystal Palace" was chosen for the proposed new home since a facility under this name had stood in Victoria Park from 1860 until 1891.

It was felt that a Crystal Palace would provide a more appropriate setting for the Mum Show's annual displays. The idea gained further impetus with the adoption in 1985 of a new Master Plan (final plan documents prepared by Coombes/Kirkland Berridge) for a part of the waterfront at the west end of the harbour. Under this plan, a Crystal Palace was to be a prominent component of the waterfront.

1.2 OBJECTIVES AND KEY ISSUES

Five objectives emerged in 1985 as defining the nature of the proposed Crystal Palace: It should achieve the following:

- o Become a visual symbol for Hamilton;
- o Re-establish a historical asset;
- o Establish a core attraction for citizens of Hamilton and the Golden Horseshoe, and a major tourist attraction for visitors from elsewhere;
- o Establish a supporting volunteer organization (noting that this project has grown out of the existing Volunteer Mum Show Committee);

- o Encourage leisure time activities for all interested in the pleasures of horticulture and related arts and crafts.

When the New Crystal Palace Committee was formed, it was felt that such a building might be established in Hamilton Island. The waterfront master planning process caused the committee to concentrate on the waterfront as the most likely location for the Crystal Palace. Recent delays in the implementation of the waterfront Master Plan have caused the New Crystal Palace Committee to return to a consideration of other sites. In the process, the objectives have been streamlined into four elements:

- o A symbol for the City of Hamilton;
- o A horticultural display centre;
- o A venue for formal Civic Receptions;
- o A food service facility (restaurant, tea room or other).

The actual scale and character of any Crystal Palace concept developed depends on two factors:

- o the site chosen;
- o the consequent opportunities and limitations, physically and operationally, for realizing each of the above four elements.

There is considerable interaction between these two factors; the choice of a site markedly affects, to a differing degree for each site, the possible nature of a Crystal Palace that can be built.

Baird Sampson reviewed twelve potential sites for the Crystal Palace and, with the approval of the Crystal Palace Location Committee, reduced the sites under active consideration from twelve to four. These are:

- o Commonwealth Square
- o Confederation Park

- o Gage Park
- o McQuesten Park

This study examines the impact of each of these sites on the development of the 4 elements of the concept. For each site we have made preliminary attendance projections, considered the feasibility from an operating point of view, estimated the economic impact on Hamilton and proposed appropriate programming and management for the facility.

1.3 METHODOLOGY

We reviewed existing studies and reports including the following:

- o Annual Report, 1988; Economic Development Department.
- o Tourism in Hamilton-Wentworth - A Program for Economic Growth; Peter Barnard Associates, May 1986.
- o Tourism in the Greater Hamilton Area; Hamilton and District Chamber of Commerce, 1986 and 1988 review of recommendations.
- o Hamilton Waterfront Development; Marshall Macklin Monaghan, August 1988.
- o Economic Trends (Greater Hamilton); Planning and Development Department, 1989.
- o Population Trends and Projections (Greater Hamilton); Planning and Development Department, 1989.
- o Allan Gardens Revitalization Study; Arcop Architects, May 1987 (Marketing Study conducted by Coopers and Lybrand).
- o Ontario Motor Coach Tour Industry, 1988; Ontario Ministry of Tourism and Recreation.
- o Confederation Park Master Plan; Moore/George Associates, 1985.

We also conducted an extensive interview program, including Crystal Palace Committee members, aldermen for each of the four wards in which locations were considered for the Crystal Palace; and city officials. For a complete list of interviewees see Appendix I.

In addition, we examined the Mum Show and a number of existing facilities comparable to the proposed Crystal Palace. This analysis included a review of

the components such as size of displays, attendance figures, admission charges, location, budget and the parking.

2. EXISTING FLORAL SHOWS AND FACILITIES IN THE HAMILTON REGION

2.1 MUM SHOW

2.1.1 Overview

Each year in early November, a public display of chrysanthemums is organized by Hamilton's Parks Division and the Volunteer Mum Show Committee (Mums). During the event over 240 varieties of chrysanthemums are displayed in Gage Park's greenhouses. Although Gage Park lacks a suitable floral showroom, attending the event has become an annual tradition for many residents of the Region; it also attracts a considerable number of tourists.

2.1.2 Attendance and Admission Charges

In recent years, attendance has reached as high as 40,000, although 1989's figures were reportedly only 33,000. During peak visitation periods, such as on weekends and some week day evenings, long line-ups of people waiting to see the displays are common.

While the event attracts people of all ages, the major segment of visitors are seniors. An estimated 60 motor coach tours (2,400 people) visit the show each year and 150 school classes (4,500 students) also attend.

There is no admission charge and free parking is available on-site.

2.1.3 Location and Size of Facilities

Gage Park is 77 acres in size and is about a ten minute drive from City Hall. The greenhouses are approximately 35,000 sq ft of which about 19,000 sq ft are used as display area during the Mum Show. In addition, the Mum Show uses 5,000 sq ft of space for the following purposes:

Table 1
MUM SHOW OPERATING COSTS, 1989 (\$)

Greenhouse Contractual Services	
Mum Show Signs	800
New Hophouse (50%)*	9,000
Canopy Rental	780
Costume Rental	227
Mannequin Rental	97
McInyre Electric	683
Sub-Total	<u>11,937</u>
Greenhouse Repairs & Maintenance	
Building Supplies	723
McInyre Electric (50%)	3,652
Turbo Washer (25%)	205
Greenhouse Glass (30%)	346
Pots and Pesticides (50%)	585
Sand and Topsoil (50%)	513
SUBTOTAL	<u>6,023</u>
Greenhouse Operating Supplies	
Building Supplies	2,850
Greenhouse Lighting (50%)	1,200
Sand and Topsoil (50%)	730
Chemicals (50%)	4,075
Pots (50%)	2,100
Cuttings	2,000
Sub-Total	<u>12,955</u>
Greenhouse Man-Hours	
Watering/Applying Fertilizers	8,850
Pesticides Application	2,300
Making Cuttings	2,050
Planting Mums & Preparing Soil	15,900
Tying and Staking Mums	36,200
Setting up Show	19,000
Maintenance of Show	18,000
Dismantling Show	15,000
Sub-Total	<u>117,300</u>
Utilities (50% of Annual Total)	
Water/Sewer	2,300
Hydro	3,550
Heating	36,000
Telephone	325
Sub-Total	<u>42,175</u>
General Horticultural Maintenance	
Building Supplies	2,452
Photography/Graphic/Arts Supplies	1,579
Plant Material	1,130
Dry Cleaners	300
Sub-Total	<u>5,461</u>
General Horticultural Maintenance	
Building Supplies	2,874
Office Furnishings	
Microwave Oven (50%)	162
Maintenance of Cultivated Areas	
Building Supplies	509
Photography/Graphic/Art Supplies	152
Mum Show Workshop	500
Sub-Total	<u>1,162</u>
Beautification Man-Hours (various accounts)	
Carpenter and Helper	17,300
Labourer/Landscape Designer	11,000
Foreman	8,000
Sign Installation	2,400
Painting	4,300
General Help	4,000
Sub-Total	<u>48,000</u>
Money Spent on Mum Show from Beautification Account	
	<u>57,657</u>
TOTAL	305,704

* Figures appearing in brackets indicate the percentage of total cost accounted for by the Mum Show.

- o concessions and information services to the public;
- o a lounge for the volunteers;
- o a kitchen.

2.1.4 Operating budget

The Parks Division estimates that the 1989 Mum Show was prepared and staged at a cost of \$300,000. A breakdown of the costs is provided in Table 1, opposite.

2.1.5 Volunteer Committee

The Volunteer Mum Show Committee is responsible for promoting and hosting the Show and it is also involved to some degree in planning the event. During the Show, over 150 volunteers are involved in receiving and guiding the public to the displays. They also staff a small refreshments area and sell 'mums and calendars to the public. Proceeds from these activities are used to help cover advertising expenses.

2.1.6 Administration and Management

The Parks Division of the Public Works Department is responsible for growing the flowers from cuttings, supplying the 'mums to the show and building the displays. The Volunteer Mum Committee provides volunteers to host the show and is also responsible for developing the annual theme at the show.

2.1.7 Current Needs

Gage Park's greenhouses lack sufficient space to accommodate the thousands of visitors that come to the Show without causing considerable congestion. As a result, the most pressing need for the Mum Show is space for a formal floral display and space to hold proper receptions for the visitors.

The Volunteer Committee has expressed interest in participating in additional floral shows if proper facilities were available.

2.2

ROYAL BOTANICAL GARDENS

The RBG is one of North America's most important and distinguished botanical complexes. It also offers a range of recreational-horticultural activities at its 2,000 acre site. Although located in Halton Region within the boundaries of the City of Burlington, the RBG is only 20 minutes from downtown Hamilton by car.

A wide range of programmes and activities are offered at the RBG for both students and the general public. Of most relevance to the Crystal Palace is the RBG's Mediterranean Garden House. This House is a static display of plants originating in places with Mediterranean-type climates. Its display area is about 16,000 sq ft in size.

Although the RBG's gardens and programmes attract between 750,000 to 1 million people annually, the Mediterranean Garden does not seem to attract large numbers of visitors. According to the RBG's annual report, the Garden generates about \$18,000 from admission fees. Given that admission fees are \$1 for adults and \$0.75 for seniors, children and students, this suggests a paid attendance at the Garden of between 20,000 - 25,000.

However, overall attendance at the Garden is probably closer to 50,000 given that not everyone pays the admission charge: the entrance to the Garden is unattended and therefore visitors have the option of paying or not paying admission; also, the RBG hosts a variety of functions and events such as weddings and educational programmes that allow free access to the Garden.

The director of the RBG believes that attendance levels at the Garden would be greater - particularly during the winter season - if public transportation to the RBG was available.

Ample on-site parking is available at \$2.50 per car.

3. OVERVIEW OF HAMILTON'S DEMOGRAPHICS, ECONOMY AND TOURISM

3.1 POPULATION

The population of Hamilton-Wentworth Region stood at about 430,000 in 1988, of which just over 70% live in the City of Hamilton. (However, we note that, according to the most recent Statistics Canada census, conducted in 1986, the population for the greater metropolitan area of Hamilton which includes the Burlington area is listed as being over 550,000).

Below are the latest projections for the population of Hamilton-Wentworth:

Table 2

Projected Population Growth By Age Cohort Hamilton-Wentworth, 1988-2006

	1988	1996	2006	% Change 1988-2006
0-14	82,910	87,900	83,000	0
15-24	64,391	57,700	61,900	-4
25-39	105,721	107,600	92,500	-13
40-64	119,175	136,200	171,700	44
65+	57,270	68,600	73,900	29
TOTAL	429,467	458,000	483,000	12

Source: *Population Trends and Projections Hamilton-Wentworth
Region, Planning and Development Department*

Among the other more relevant population projections for the Region are the following:

- o Current per annum growth rate for the Region is 1% whereas the average for Ontario is 1.7%.

- o The size of the 40-64 year age group is forecast to grow 44% over the next two decades. This group already represents the largest segment of the population (41%) and its share will increase to 53% by 2006.
- o The population over 64 years of age will increase at 29% from now until 2006 - more than twice the rate as the rest of the population.

As the projections indicate, Hamilton-Wentworth's population profile is becoming older. This is a significant development for a proposed Crystal Palace: we found that seniors tend to represent a major, if not the principal, segment of visitors attending leisure and recreational facilities such as a Crystal Palace. This issue is also addressed in an 1986 report from Statistics Canada, *Culture Statistics: The Economic Impact of the Arts and Culture Sector*, which recognizes that Canada's population as a whole is getting older and that this will mean an increasing demand for leisure and recreational facilities.

3.2 TOURISM

Hamilton has recently strengthened its efforts to promote the Region to tourism. This is a positive development for the proposed Crystal Palace since tourists are the largest group of visitors to a number of comparable facilities in other cities (discussed in Section 4 below).

Hamilton's Economic Development Department defines a tourist as "one who travels 25 miles or more from his/her home to visit an attraction, special event, restaurant, etc". Using this definition, an estimated 1.2 million tourists visited Hamilton-Wentworth in 1988 and generated over \$100 million into the Region's economy.

In 1986, the Hamilton and District Chamber of Commerce had an extensive study conducted on the Region's tourism industry. One of the major findings was that the Region's attractions suffered from limited promotion. As a result,

the study produced several recommendations on ways to address to foster further growth in the industry. A review of these recommendations was conducted in 1988 and indicates that the Region has adopted a number of the study's original suggestions in an effort to enhance its tourism industry.

Among the recent developments are the following:

- o The budget for the Region's Visitor and Convention Services Department has increased from \$300,000 in 1985 to \$800,000 in 1987;
- o A Tourism Advisory Board has been created;
- o A Tourism Information Centre has been established in downtown Hamilton and one is planned for Confederation Park;
- o Promotion of the Region is continuing in the province as well as in adjacent provinces and nearby American cities.

3.2.1 Conventions

Conventions represent a significant source of visitors to Hamilton.. Between 1986-1988, the city averaged over 60,000 convention delegates a year. In addition, an estimated 50%-60% of convention delegates are accompanied by their spouses for a total of 90,000 convention-related visitors. Average stay of these visitors is 2.5 days.

While the delegates are attending the conferences, convention planners and Visitor and Convention Services organize sightseeing bus tours for the delegates' spouses. They are given the opportunity beforehand to select which activities they would like to do. One of the most popular choices is attending the Mum Show when it coincides with a convention.

According to the Visitor and Convention Services office, if flower shows were available during other times of the year, these would be also be well attended by spouses of convention delegates. Our research supports this opinion.

Convention delegates and their spouses are an important segment of visitors to the Atlanta Botanical Gardens (see section 4.3).

3.2.2 Motor Coaches

According to the Economic Development Department's 1988 Annual Report, a total of 691 motor coaches carrying 29,255 passengers were reported to have visited attractions in the Region. However, the actual number of Motor Coach tours that came to the Region is probably much higher.

A study on the Ontario Motor Coach Tour Industry (conducted in 1988 by James F. Hickling Management Consultants), found that, in 1986, Hamilton was the tenth most popular destination for scheduled multi-day motor coach tours to Ontario, with 191 such tours taking place during that year.

During the three weeks that the Mums' show is staged, nearly all the tour buses coming through the Region visit the Mums show. Between 60-70 motor coach tours stop-over at the Mum Show which represents an estimated 8% of the total number of motor coach tours that come to the Region each year. The percentage would be much higher were it not for the fact that the Show happens during the low season for motor coach tours and runs for a limited length of time.

According to estimates of the Visitor and Convention Services, of the total motor coach tours visiting the Region every year, 40% take place in the spring season (March-June). Our research shows that, for Ontario as a whole, May through October is the main period for motor coach tours. This is when 76% of expenditures generated by all motor coach tours in Ontario takes place, as illustrated by Table 3.

Table 3

Monthly Share of Expenditures -
Motor Coach Tours to Ontario, 1986
(by month, % share)

January	1.6
February	1.7
March	2.2
April	3.4
May	10.2
June	13.3
July	17.4
August	18.6
September	17.4
October	9.3
November	2.9
December	<u>2.2</u>
Total	100.0

Note: Figures are rounded

Source: Ontario Motor Coach Industry, 1988

These findings strongly suggest that there is an important programming opportunity for the proposed Crystal Palace: wherever the facility is located, it should stage an extended spring show and a summer show to target the large motor coach market.

Currently, thousands of motor coach tours drive through the Region along the highways (such as the QEW) but do not stop to visit local attractions. As examples of this, we note that Niagara Falls and Toronto respectively drew over 2,300 and over 1,500 scheduled multi-day motor coach tours in 1986.

The experience of comparable facilities suggest that a well promoted Crystal Palace may stimulate additional motor coach tours to come to the Region. Cullen Gardens in Markham and the Bloedel Conservatory in Vancouver are both established attractions for motor coach tours.

3.3

OTHER MAJOR PUBLIC ATTRACTIONS IN HAMILTON

Among the major attractions in or near Hamilton are the following:

Attraction	Attendance (1986)
RBG	750,000
African Lion Safari	300,000
Confederation Park (Wild Water Works, Wave Pool Waterslide)	150,000
Hamilton Art Gallery*	100,000
Dundurn Castle	66,000
Hamilton Military Museum	29,000
Canadian Football Hall of Fame	5,300

Source: Tourism in Hamilton-Wentworth, a Program for Economic Growth; by Peter Barnard Associates, May 1986

* Source: Hamilton Art Gallery, 1989.

3.4

LOCAL ECONOMY

Hamilton-Wentworth's economy has enjoyed a buoyant period since the recession of the early 1980's. There has been a recovery in the local steel industry and housing starts were over 22% between 1985 and 1988. Real per capita income rose by over 16% between 1986 and 1988 which was above the Ontario average of 14%. Moreover, real disposable income also increased by 16% during this period - about the twice the national average.

Once a predominantly manufacturing economy, the Region now employs more people in the business services industries than in manufacturing.

4. COMPARABLE FACILITIES IN OTHER CITIES

4.1 INTRODUCTION

In addition to the Mediterranean Garden of the RBG, we reviewed four other horticultural facilities open to the public, including the Fuqua Conservatory in Atlanta, the Bloedel Conservatory in Vancouver, the Crystal Garden in Victoria and Allan Gardens in Toronto.

While each conservatory or enclosed garden is unique, a review of existing facilities is useful to generate ideas as to what the concept of the Crystal Palace should be, including its size, components, and programming. In addition, we also learned what the attendance and operating budgets (revenues and expenses whenever possible) were for each facility. This assisted us in projecting attendance and budgets for the proposed Crystal Palace in Hamilton.

Below are our findings for each facility. At the end of this section, we compare the principal findings and analyse how the information may be of assistance to the further development of the Crystal Palace concept.

4.2 BLOEDEL CONSERVATORY, VANCOUVER

4.2.1 Introduction, Size and Displays

The Bloedel Conservatory opened in Vancouver in 1969. It is a dome shaped building and has 15,000 sq ft of public display space. Overall, the facility is about 17,000 sq ft in size.

The Conservatory is one large display room composed mainly of tropical plants in a permanent jungle-like setting. Finches fly about freely and there is also a fish pond.

Although a variety of flowers are included in the exhibit, these are changed very gradually and do not alter the overall look of the display.

There is a gift shop in the facility but no food services.

4.2.2 Location

Bloedel is located in Queen Elizabeth Park, which is 121 acres in size. It is in a residential neighbourhood of Vancouver and is a 10-15 minute drive from the downtown area.

4.2.3 Attendance and Admission Charges

Annual attendance is about 250,000 at the Conservatory. According to the facility's Superintendent, about 80% of the visitors are tourists. He indicated to us that when the Conservatory first opened, annual attendance reached 400,000. However, since the facility undergoes only gradual changes in its displays from year to year, there is not much new to see for previous visitors. As a result, attendance among local residents declined considerably after the initial years.

A significant number of tourists visiting the Bloedel Conservatory are Americans. Families and bus tours visit the facility regularly. Vancouver has also become a port of call for American tourists on cruises heading for Alaska. The Conservatory is often on the agenda of sights to see during these stop-overs. In contrast to some of the other comparable facilities, the facility attracts few field trips from local schools.

Admission to the Conservatory is \$2.30 for adults and \$1.15 for seniors, students and children.

4.2.4 Operating Budget

We learned that the facility is practically self-financing as a result of revenues from admissions and from the gift shop. Each of these sources accounts for about 50% of total annual revenues, which range from \$500,000 to \$600,000.

Depending on the level of repairs required and the extent to which parts of the displays undergo changes, the annual expenses oscillate between \$500,000 and \$600,000. Keeping this in mind, below are estimates of the Bloedel's current expense budget:

EXPENSES	\$
Salaries	80,000
Cashiers (gift shop)	40,000
Labour	140,000
Marketing	10,000
Maintenance	100,000
Heating	25,000
Electricity	40,000
Other	<u>65,000</u>
TOTAL	500,000

As the figures above indicate, marketing accounts for only 2% of the entire budget. However, the Conservatory's Superintendent explained that, since the facility is now well-known and an established destination within the local tourist industry, little advertising is needed to maintain current attendance levels.

4.2.5 Management and Staffing

Administration of the Bloedel Conservatory is carried out by the Vancouver Parks Department. A full-time Superintendent of the Conservatory reports to the Supervisor of Floral Culture for the City of Vancouver.

4.2.6 Parking

A large free parking area for cars exists in the park. However, it is not accessible to buses. This poses a problem since there are only 6 spaces for buses nearby. During peak attendance periods, there are as many as 20 bus tours at the Conservatory forcing drivers to park on the side of the road leading up to the Conservatory.

4.3 FUQUA CONSERVATORY, ATLANTA

4.3.1 Introduction, Size and Displays

The Fuqua Conservatory was opened in March 1989 in the Atlanta Botanical Gardens (ABG). The Conservatory has a total of 17,200 sq ft of display area, divided into six rooms and three different climates. Most of the space - 16,000 sq ft - is devoted to permanent displays of tropical, desert and endangered species. There is also a 1,200 sq ft special exhibit area for changing displays. Within the display area is a 14 foot waterfall.

Another component of the conservatory is a 10,000 sq ft support greenhouse which makes the facility's overall size at over 27,000 sq ft. All flowers and plants displayed are grown on-site. In fact, the Executive Director of the ABG strongly advised us against not including significant back-up greenhouses adjoining the proposed Crystal Palace. The director was of the opinion that having to the continuously move plants in from off-site locations is an inefficient approach to running an horticultural facility.

Other attractions at the ABG include vegetable, rose and Japanese gardens and a 15-acre hardwood forest. Educational activities include summer day camps for children. There is also a library on-site.

4.3.2 Location

The ABG is 60 acres in size and is located in a 183 acre park about five minutes away from downtown Atlanta. The ABG has become a well established tourist attraction in the southern United States.

4.3.3 Attendance and Admission Charges

Current attendance at the ABG is 150,000 annually. However, with the opening of the Conservatory, the ABG forecasts that annual attendance will more than double.

While the ABG does not keep precise profiles of attendance, the Gardens' Executive Director indicated that senior citizens made up the largest segment of their visitors. Since Atlanta is a major convention destination, many visitors to the ABG are from out-of-town. According to the Executive Director, the city's local hospitality services regularly take spouses accompanying convention delegates to visit the ABG. Church groups from all over the United States also find the Gardens an appealing destination. In addition, the Gardens regularly hosts classes of local school children. Tours are arranged for visiting groups when advance notice is given.

Admission to the ABG - which includes admission to the Fuqua Conservatory - is as follows: US\$4.50 for adults and US\$2.25 for seniors, students and children. Thursday afternoons are open free to the public and as a result, are very busy periods.

4.3.4 Capital Cost and Operating Budget

The Fuqua Conservatory cost US\$5.5 million to build. This sum was donated by one individual. Operating expenses are not available for Fuqua although for the entire ABG it is US\$1.6 million. About 3% of the entire budget is spent on marketing.

4.3.5 Management and Staffing

The entire ABG is run by a non-profit organization. Staff for the Fuqua Conservatory includes a superintendent, three curators and two gardeners working in the backup greenhouse.

4.4 CRYSTAL GARDEN, VICTORIA

4.4.1 History

Canadian Pacific built the City of Victoria's original Crystal Garden in 1925. CP continued to own and operate the Garden until it closed it in the mid-1970's. During this period, the Garden became the social-cultural centre of the city, offering a variety of recreational activities such as flower shows, badminton, an indoor salt water swimming pool, and a place to hear big bands or hold conventions. CP eventually closed the facility because it became too expensive to run. The Garden was given over to the City of Victoria and, as a result of a local campaign to restore the Garden, a scaled-down and new version of the Crystal Garden was reopened in 1980.

4.4.2 Introduction, Size and Displays

The current Crystal Garden is about 26,000 sq ft in size and is made up of the following components:

- o A conservatory containing a permanent tropical display (20,000 sq ft);

- o A hall for weddings and other functions (3,500 sq ft);
- o An aviary that houses over 100 birds such as parrots and flamingos; there is also adjoining space for the Garden's small animals (2,500 sq ft) which include the smallest species of monkeys in the world;
- o A mezzanine which overlooks the garden. It is used as a tea room from which visitors can have a snack and view the Garden. Afternoon tea costs \$6.95 per person. There are about 100 seats;
- o Sloping walkways throughout the Garden;
- o A fish pond and a waterfall.

4.4.3 Location

The Crystal Garden is located in downtown Victoria in a commercial building. This building is about 40,000 sq ft in size and it is not situated on or adjacent to a park. Within this building are six independently operated retail shops that include a large restaurant, a gift shop, and other stores. The owners of this restaurant also run the Garden's tea room.

4.4.4 Attendance and Admission Charges

When the Crystal Garden was reopened in 1980, its Director outlined three major objectives for the facility which were as follows:

1. Establish the facility as a major tourist attraction;
2. Create a major community rental facility;
3. Create an education programme from the Garden and tie it to the curriculum local schools.

The first two objectives have been realized¹. Of the 130,000 people who visit the Garden annually, approximately 80% are tourists. Admission to the site is \$5.50 for adults and \$3.00 for seniors and students. According to the Garden's Director, the price of admission has been rising steadily since the facility reopened and is now at "parity" with other tourist attractions in Victoria.

¹ The educational component has yet to be developed.

Despite the increases in admission, there has not been a noticeable impact on attendance, primarily because the facility is aimed at tourists - not local residents. In fact, the Director indicated to us that local residents do not visit tourist attractions except when visited by friends and relatives from out-of-town. Moreover, since there is only a limited amount of rotating or seasonal displays, there is little interest generated for local residents to make frequent visits to the facility. However, season passes are available at the rate of \$11 for the general public, \$7 for seniors. Each year about 200 general and 150 senior passes are sold. Although these numbers may appear to be relatively low, the major reason is that their availability is not promoted significantly. As mentioned below, most of the marketing conducted is aimed at the tourist market.

Local residents are the target market for the facility ballroom which is rented for weddings, banquets and private parties. During these events, the tropical garden serves as a unique and inviting "background". Rentals of the facility draws about 60,000 people.

4.4.5 Operating Budget

Over the last few years, the entire facility has managed to turn a small profit.

Below is a breakdown for the expenses to run the permanent horticultural display only. The figures do not include the cost of maintaining the other components such as the aviary and the ballroom:

EXPENSES	\$
Salaries/Benefits	75,500
Travel	2,000
Growing Supplies	4,500
Freight	3,000
Information Services	1,500
Plant Replacement	31,500
Biological Control	4,500
Other	1,500
Signage	2,000
Building Maintenance	125,000
Marketing	<u>70,000</u>
TOTAL	321,000

The \$70,000 spent on marketing the permanent display represents about 6% of the facility's entire budget. According to the Garden's director, this is in line with other tourist attractions in Victoria which spend on average 6-8% of their overall budgets on promotion.

A breakdown of revenues for the horticultural display only is not possible since the admission fee provides access to the aviary. Below is an account of the revenues generated by the entire facility:

REVENUES	\$
Admissions (includes entry to the aviary)	627,000
Rent from Tenants in Building	228,000
Tour Sales	30,000
Tea Room (net profit to the Garden)	25,000
Ball Room Rental	<u>193,500</u>
Total	1,103,500

An independent firm operates the tea room and, in return, pays the Garden 20% of gross revenues. This arrangement is currently generating \$25,000 in income for the Garden.

4.4.6 Management and Staffing

The Crystal Garden (and the retail stores and restaurant) are administered by the Provincial Capital Commission which is also responsible for a number of other buildings in downtown Victoria. In addition to the Director, the Garden employs the equivalent of 12 permanent staff. The horticultural component employs the equivalent of 2.5 full time people. It should be noted that the main offices of the Director of the Crystal Garden are located at the Provincial Capital Commission's head offices which happen to be across the street from the Crystal Garden.

4.4.7 Parking

Parking is a problem in downtown Victoria. The Garden itself has a small lot with only eight parking spaces available. However, since most of the Garden's visitors are tourists, many tend to go sightseeing downtown on foot. Those who have cars usually leave them cars at the hotels or elsewhere away from the downtown area. Also, many of the visitors come on bus tours.

4.5 ALLAN GARDENS, TORONTO

4.5.1 Introduction, Size and Displays

The origins of the Allan Gardens dates back to 1860 when it was known as the Botanical Garden. It has evolved into a public conservatory approximately 19,000 sq ft-20,000 sq ft in size of which about 18,000 sq ft are public viewing areas.

Most of the plant displays are permanent and are divided in six greenhouses, each of which has a slightly different temperature. Plants on display range from temperate climates to tropical and arid ones.

Temporary exhibits are also staged regularly throughout the year. These include a mums' show, a Christmas presentation, a spring show and other smaller displays. Allan Gardens sources the flowers for these shows from the city's nursery greenhouses in another park which is a 20 minute drive across town. During the winter, the flowers are transported in heated vans. Staff at Allan Gardens indicated that they have not experienced any problems in moving the plants.

There are also outdoor gardens surrounding the conservatory.

4.5.2 Location

Allan Gardens is situated in downtown Toronto on 13 acres of park.

4.5.3 Attendance and Admission Charges

In spite of its central location in a heavily populated city, Allan Gardens draws only 100,000 visitors a year. What is even more surprising is that the facility is open free to the public. In comparison to similar facilities elsewhere, relatively few tourists visit Allan Gardens. It seems that although most Torontonians have probably heard of the Allan Gardens, they have a low degree of awareness as to the location and what exactly the facility has to offer. It would appear, therefore, that the low attendance levels is owing to a concerted promotion of the facility. Unlike other gardens reviewed, for example, the Allan Gardens seems not to have made an effort to establish itself as a destination for tourists.

4.5.4 Operating Budget

We have partial figures only for operating costs of Allan Gardens, since the Parks and Recreation Department of the City of Toronto amalgamates certain

Table 4

COMPARABLE FACILITIES: SUMMARY

	Bloedel Conservatory	Fuqua Conservatory	Crystal Garden	Allan Gardens	Mediterranean Garden (RBG)
Location	Vancouver	Atlanta	Victoria	Toronto	Burlington/ Hamilton
Metropolitan Population	1,380,000	2,250,000	260,000	3,430,000	500,000
Year Established	1969	1989	1980 (reopened)	1860	
Governing Authority	Parks Department	Non-Profit	Provincial Capital Commission	Parks Department	Non-Profit
Annual Attendance	250,000	150,000	190,000	100,000	50,000 ¹
Admission Charges (\$)					
Adults	2.30	4.50	5.00	F	1.00
Seniors	1.15	2.25	3.00	R	.75
Students	1.15	2.25	3.00	E	1.00
Children	1.15	2.25	3.00	E	.75
Size of Display Area (sq ft)	15,000	17,200	20,000	18,000	16,000
Size of Faci- lity (sq ft)	17,000	27,000	26,000	20,000	n/a
Size of Site or Park	121 acres	183 acres	41,000 sq ft	13 acres	2,700 acres
Other Components					
Changing Displays	Some	Yes	No	Yes	Yes
Gift Shop	Yes	Yes	Yes ²	Yes	Yes
Food Service	No	Yes	Yes	Yes	Yes
Operating Budget of entire facility (\$)	500,000	1.9 million	1.2 million	400,000	3.8 million

¹ Attendance at the Royal Botanical Gardens' as a whole is estimated to be over 750,000 people.

² There is an independently-operated gift shop in the same building as the Crystal Garden.

expenses with its other activities. Below is a list of some of the facility's expenses:

EXPENSES	\$
Salaries	150,000
Materials	10,000
Maintenance and utilities	<u>88,500</u>
Total of Above Items	248,500

Actual total operating costs are probably somewhere between \$300,000-\$400,000 if the costs of growing and transporting the plants and flowers were included.

4.5.5 Management and Staffing

Staff at Allan Gardens includes a full-time supervisor and four permanent gardeners. Administration of the Gardens is the responsibility of the Parks and Recreation Department of the City of Toronto.

4.5.6 Parking

There is no on-site parking. However, since attendance is relatively low, parking does not seem to be an issue. The area is easily accessible by public transportation.

4.6 SUMMARY AND CONCLUSIONS

A summary of the principal findings of the review of comparable facilities is provided in Table 4, opposite. The main conclusions are as follows:

Sizes of Display Areas

- o The horticultural display areas of the facilities examined are all within a range of 15,000 sq ft to 20,000 sq ft. However, each of the facilities is unique in terms of its physical and programming components.

Types of Displays

- o Some of the facilities focus almost exclusively on having permanent horticultural displays such as the Crystal Garden, Mediterranean Garden and the Bloedel Conservatory. Others, like the Fuqua Conservatory stage a considerable amount of temporary floral displays.

Location

- o Some of the facilities are located in downtown sites, while others are in parks some distance away from the downtown core.

Attendance and Admission Charges

- o Marketing is crucial to the success of Conservatories. Although the Allan Gardens does not charge admission, it has one of the lowest attendance figures among the facilities compared. It is also the facility that conducts the least amount of marketing.
- o Most of the facilities examined have become major tourist attractions for out-of-town visitors.
- o There is no discernible correlation between the level of attendance at the facilities and the local population base.
- o While the level of admission charged varies widely, the facilities that charge a higher fee tend to offer a greater number of attractions.
- o Changing displays are necessary to encourage repeat visits among local residents.

Operating Budgets

- o It is possible for Conservatories to be financially self-sustaining, as is indicated by the Crystal Garden and the Bloedel Conservatory. Admissions, facility rentals, memberships and gift shop and restaurant sales are the major revenue generators.
- o Facilities such as the Allan Gardens require significant levels of government operating funding. However, Allan Gardens is not striving to be self-sustaining. In fact, it is open free to the public.

Management and Staffing

- o Most facilities examined are administered by the Parks and Recreation Department and employ a director to head a management team.
- o A key to operating a successful facility is a large, active volunteer network. Volunteers can conduct many of the activities that would otherwise require paid staff.

Parking

- o We were advised that 150 parking spaces are required for normal use, while peak periods may create the need for 200-250 spaces.

5. CRYSTAL PALACE

5.1 INTRODUCTION

As we highlighted in section 1.2 above, the concept of the Crystal Palace is largely dependent on two factors: the location chosen and the scale on which each of the four elements is built and run (see section 1.2 for a list of the four elements that were identified by the Crystal Palace Committee). Moreover, these two factors are interrelated: the location affects the degree to which each element may be developed.

In this section we examine how each location impacts on the concept including the extent to which each may accommodate the four elements. We are also including preliminary attendance and operating budget projections.

We should note that our interviewees expressed different preferences for the site of a Crystal Palace.

5.2 DISCUSSION OF IMPACT OF EACH SHORT LIST SITE ON THE CONCEPT

5.2.1 Commonwealth Square

Commonwealth Square is the only location among the four site options that is not a park. While it would represent a bold and exciting intrusion of a floral environment into a dense urban setting, it is not without precedent: the Crystal Garden in Victoria has successfully followed this approach (see section 4.4).

Horticultural Displays

At this location, a permanent horticultural display would serve as a unique backdrop to formal civic receptions or events organized by the adjacent facilities, particularly the Convention Centre. On its own, the display would be

an ongoing attraction to other tourists visiting the City as well as to Hamiltonians shopping in the downtown area or working nearby.

Seasonal displays (see section 5.3) are likely to create a greater public presence at a downtown site than at any other alternative location. Organizers of the Mum Show informed us that, despite the event's huge success, many Hamiltonians are unfamiliar with it.

Commonwealth Square cannot accommodate ancillary greenhouses. This means that all plants and flowers will have to be sourced off-site unlike the other alternative locations. However, as the experience of other comparable facilities demonstrates (Allan Gardens, Crystal Garden and Bloedel Conservatory), moving plants and flowers in a city is not financially onerous nor is it a difficult thing to do. A significant number of leading authorities regard it as a fully practical way to proceed. A heated van would be needed periodically to transport plants to replenish a permanent horticultural display. During the preparation of each seasonal display, this van would need to make several trips within a one-week period between off-site greenhouses and Commonwealth Square. The total time in a year that the Crystal Palace would require use of a van would, therefore, be less than two months. When not in use for Crystal Palace activities, this van would be available for use by the Public Works Department or other City departments. Actual operating costs for the Crystal Palace would be the maintenance of the van for two months (Public Works would be using and therefore covering costs for the remaining part of the year) plus a proportion of the salaries of one or two movers borrowed from the Parks Division.

Symbol of Hamilton and Civic Receptions

This prime downtown land offers the best opportunity to establish the Crystal Palace as a highly visible cultural symbol of the City. It would be in the civic, cultural and recreational heart of the City as a result of its juxtaposition to the Convention Centre, the Art Gallery, Hamilton Place and City Hall.

At this site, it would be advantageous to design the Crystal Palace in such a way as to include a public assembly area. This space would be suitable for changing displays and allow for public receptions.

We met with the chairman of the Art Gallery board and we met with the chairman of the board for the Convention Centre along with the Centre's managing director to discuss what the possible effects would be of locating a Crystal Palace at Commonwealth Square. These officials were in agreement that the Crystal Palace would have a positive impact on existing facilities on the Square. They also indicated support in principle for the idea of organizing joint events and activities, particularly between the Crystal Palace and the Convention Centre. This is discussed in more detail under HECFI below.

A formal display area would be appropriate at this location and could be used as a venue for civic events and a place to hold receptions for visiting dignitaries. It would also serve as a place for opening ceremonies of floral shows.

Food Facility

A prominent food service component is essential at this site to enable the Crystal Palace to stage activities involving convention delegates and civic receptions.

We recommend that a Crystal Palace at Commonwealth Square include either one of the following components:

- o A "tea room" overlooking the garden in a mezzanine floor such as the one at the Crystal Garden, or
- o A middle to upscale restaurant adjoining the main display area. Cultural facilities that have adopted this concept include the Ontario Art Gallery and the Vancouver Art Gallery.

A tea room or a restaurant at a downtown location can be a profitable component as the experience of other comparable facilities shows. As discussed in Section 4.4, the tea room at the Crystal Garden in Victoria is run by an independent firm. This firm pays the facility 20% of gross revenues which amount to about \$25,000 annually. There is also a profitable, independently run restaurant in the same building as the Crystal Garden where a typical entrée costs about \$15.

Another example of a cultural facility with on-site food services is the Ontario Art Gallery which operates a 110 seat restaurant. It is open primarily for lunch and special functions. Lunch costs on average \$10. This facility also operates a coffee shop seating 80 people and a members' lounge seating 50. Although the gallery's restaurant is not usually open to the public in the evening, it manages to be financially self-sustaining as a result of catering assignments it receives for private functions held at the gallery.

Gift Shop

A gift shop at this location is likely to generate a positive cash flow. The comparable facilities with gift shops (which we reviewed) are all profitable:

- o Based on the data available, we estimate that the gift shop at Bloedel Conservatory is making a net profit of over \$50,000 annually on sales of between \$250,000-\$300,000;

- o In 1988, the Floral Art Shop of the RBG recorded over \$264,000 in sales. Auxiliary volunteers operate the shop and donate any profits to help finance RBG projects. As a result of the success of the shop and other volunteer activities, a total of \$71,000 was committed to RBG projects in 1988. The greater part of these funds were profits produced from the shop.

The Auxiliary donated over 3,300 volunteer hours to operate the Floral Art Shop. To a limited degree, the model of this approach is already in practice at the Mum Show where the volunteers sell 'mums to the general public.

- o An independent gift shop exists in the same building as the Crystal Garden. We do not have financial data on this shop but according to officials of the Garden, it is a successful business.

5.2.1.1 HECFI

Hamilton Entertainment and Convention Facilities Inc. (HECFI) manages a number of the City's high profile public facilities, including the Copps Coliseum, Hamilton Place Theatre and the Convention Centre. HECFI indicated an interest in managing a Crystal Palace on Commonwealth Square. Such an arrangement would facilitate the organization of joint activities between the Palace and Hamilton Place or Convention Centre. One idea, for example, is to use the Crystal Palace to host convention functions such as breakfast meetings and evening receptions. However, HECFI agreed that annual flower events such as the Mum Show would have priority use of the Palace and that the facility would be open to the public when not in use by the Convention Centre.

Further discussions are required with HECFI to determine in more detail what are the cost-benefits of this alternative. We recommend that the Crystal Palace Committee consider pursuing this option further with HECFI. However, we note that whether even if the Committee decides to maintain an independent management of a Palace on Commonwealth Square, joint programming with HECFI would remain essential for the success of the facility.

5.2.2 Confederation Park

This site offers space for both degrees of the four elements of the Crystal Palace as well as for ancillary greenhouses, thus eliminating the costs of shipping flower displays in and out. The floral display greenhouse is amenable to a number of treatments, from elaborate to modest. The civic reception area would, in effect not be appropriate as a highly formal space; it would be more properly established as a general purpose public programming room, usable on occasion by civic authorities.

Our research indicates that there is little support to locate the Crystal Palace at Confederation Park. The primary objections cited by our interviewees regarding this location are as follows:

- o - Although plans are being prepared to develop the Park, there is still considerable uncertainty on what the specific components of this development will include:

Our understanding is that the Crystal Palace would be only one of several options for the Park. There is also some uncertainty on the likely timing for approval and implementation of a proposed Crystal Palace project;

A study conducted in 1985 - *Confederation Park, Master Landscape and Development Plan* by Moore/George Associates Inc, outlined several possible attractions that would be suitable for the park. Among the possibilities is a commercial shopping centre, the Hamilton Scourge, a restaurant, small theatres, a hotel, a skating rink, a mini-golf course, etc;

- o Of the four sites, this is the only one not under the jurisdiction of the City of Hamilton;
- o It is a place to go in the summer but has little activity during the winter:

As we mentioned above, there is currently no public transportation service to the Park in the winter;

However, one of the objectives for future development at the park, as outlined in the Moore/George study, is to increase year-round use of the park by creating public indoor facilities. Among the suggestions were: a restaurant, a community centre, cultural facilities, commercial shops, etc. A Crystal Palace would certainly fit in with this concept.

- o It is far from downtown Hamilton.

Although this is the least popular of the four possible sites, it may be a good location for the Crystal Palace if a long-term approach is adopted. Once the Region begins implementing its plans to develop the park, a Crystal Palace would have an increasingly greater impact on local residents as well as on the tourism industry.

5.2.3 Gage Park

Horticultural Displays

Gage Park is well established as a place to see floral displays among residents of the Region since it is the home of the long-running Mum Show. A Crystal Palace in this location would mean a new formal display greenhouse to stage the Mum Show, other seasonal displays and a permanent horticultural display.

Since there are existing greenhouses at the park, there will not be added costs of transporting plants such as would be the case at Commonwealth Square, nor would it be necessary to make a capital investment in greenhouses such as at McQuesten Park and at Confederation Park. However, it may be necessary to expand the greenhouses to grow additional plants and flowers to support additional floral shows.

Symbol of Hamilton and Civic Reception

Despite the success of the Mum Show, it would be more difficult to establish the Crystal Palace as a symbol of the City at Gage Park than at the other three sites. The reasons for this are as follows:

- o *The site is in a residential area, hidden from public view:*

Although the park is adjacent to Main Street, the existing greenhouses are on the opposite side of the park. The current public entrance to the greenhouses where the Crystal Palace would be built is from Lawrence Road. A more appropriate public entrance may be off Gage Avenue South where an entrance already exists but is used only by the City's Parks Division;

- o *There are no other public attractions nearby:*

Although Gage Park is not far away from downtown, it is in a residential neighbourhood with no other prominent public attractions on-site. This is in contrast to the alternative locations which would all be adjacent to or near other major public attractions. At McQuesten, there will eventually be a Multicultural Gardens; at Confederation Park a number of new attractions are under study including the Hamilton Scourge a mini-golf course a commercial centre and a hotel; Commonwealth Square is already home to the City's major cultural and recreational facilities;

- o *There may be public opposition to building additional public facilities given the historic and community nature of the park:*

As a result, it may only be feasible to build a formal display greenhouse.

We note that not everyone we interviewed is in agreement that a Crystal Palace should aim to be a symbol for the City or a place to stage formal civic events. Rather, some respondents feel that the facility should be a modest enhancement to the existing greenhouses at Gage Park, namely a formal floral display greenhouse. This would provide a home to the Mum Show and other seasonal floral events, as well as create a place where the public could visit a permanent horticultural display. If this is the concept that is ultimately chosen, then Gage Park would be the ideal location.

5.2.4 T.B. McQuesten Park

This park is presently undeveloped, but has been budgeted for as a major active addition to the Hamilton network of parks. It has several planned features which make it attractive as a site for the Crystal Palace:

- o It is intended to have a multicultural nature, with theme gardens planned representing Japan, Italy, China and other countries;
- o A public programming space is part of the proposed facility;
- o It is across the street from the Limeridge Shopping Mall, which means that this is a district of the City regularly visited by large number of residents and that families will be able to visit the park easily as part of an extended outing. The Mall also provides substantial supplementary parking;
- o It is adjacent to a planned freeway;
- o It is the terminal point of a proposed recreational trail-open space corridor system which begins at Confederation park and runs through Red Hill Creek Valley.

A Crystal Palace built here would naturally complement the already committed floral and building features of the park. It would avoid the charge of duplication of public reception/programming space that would be brought up if the Palace was, for example, at Commonwealth Square. There is plenty of room for ancillary greenhouses and parking. The embryonic nature of the park at this time probably means that there is more flexibility as to the scale of the Crystal Palace and associated components than at any other site. The Palace, reception/programming room and restaurant could be modest affairs; or they could be monumental.

The downside of this site is that the development will take some time before completion. As a result, this would probably be the least touristic location in the short term and medium term, though this would change in the long term.

At this location, potential components such as a restaurant and a gift shop could be phased in when the park is more fully developed.

5.3

PERMANENT AND SEASONAL DISPLAYS

Our research indicates that most permanent displays involve tropical or semi-tropical plants. The enchantment of a tropical garden is enhanced if it incorporate diverse components such as a small waterfall, a fish pond, different viewing levels, small bridges, etc. This concept may be applied to any of the four potential locations.

One of the original ideas for the proposed Crystal Palace was that it would also house the annual Mum Show and other major seasonal displays. However, while the changing displays will generate large levels of attendance, they are expensive to organize and stage. Even if a reasonable admission fee were charged, the event would still show a significant operating deficit. We are concerned that if four major shows are to be held as originally suggested by some members of the Crystal Palace Committee, the overall operating expenses of the Crystal Palace will be exorbitant and render the project unfeasible.

Our recommendations to address this issue are as follows:

- o There should be a maximum of three major shows annually: the Mum Show, a spring and a summer show. Smaller displays may also be held at other times of the year such as during Christmas;
- o All three of the major shows should be on a scale somewhat smaller than the current Mum Show. For example, the Mum Show currently displays over 60,000 blooms every year. We suggest that an exciting show can still be staged if only 40,000 blooms were displayed.

It is our belief that the Mum Show would continue to have its current impact on the public despite its more modest size. Given that there will be a permanent horticultural display area in the Crystal Palace, there will actually be more plants to see than at past Mum Shows. In addition, a new Crystal Palace would be architecturally more attractive and may contain other components such as a pond and an eating facility which would enhance the impact of any event being held there.

Table 5

**PROJECTED ATTENDANCE FOR EACH OF THE FOUR SITES
OF A CRYSTAL PALACE**

SOURCES OF VISITORS	Common- wealth Sq.	Confeder- ation Pk.	Gage Park	McQuesten Park
Convention Delegates	30,000	3,000	6,000	3,000
Convention Delegates' Spouses	25,000	10,000	20,000	10,000
Motor Coach Tours	15,000	10,000	12,500	10,000
Other Tourists	60,000	50,000	50,000	50,000
Local Residents	<u>80,000</u>	<u>60,000</u>	<u>65,000</u>	<u>50,000</u>
TOTAL	210,000	133,000	153,500*	123,000

* Please note: while we estimate that Gage Park's attendance would be higher than that of Confederation Park and McQuesten Park, in the long term, attendance levels at the latter two sites would probably surpass Gage's.

If the seasonal shows gain in popularity each year, and the budget allows, the events could be expanded.

There are two other issues of particular concern: first, how to allocate sufficient space for seasonal and permanent displays; and second, where will the flowers for the changing displays be grown?

Most of the facilities we reviewed have limited seasonal displays. Although Allan Gardens has four annual displays, each of these are on a much smaller scale than the Mum Show. Flowers are displayed mainly along the aisles next to the permanent displays. The Fuqua Conservatory also has 1,200 sq ft specifically allocated for special changing displays.

As the Mum Show illustrates, the costs of growing flowers and preparing the show are high. If the Crystal Palace is to stage more than one public flower show, this raises the questions as to whether the City's existing facilities can accommodate the need to grow additional flowers and at what times during the year this is possible.

5.4 PROJECTED ATTENDANCE

We have made preliminary attendance projections for the proposed Crystal Palace. The principal sources of visitors will be from the following groups: tourists, conventions delegates and their spouses, tourists on motor coach tours and local residents (seniors, classes of students, wedding parties, church groups and the general population).

We have projected attendance levels for each site based on the assumptions discussed below. Table 5, opposite, summarizes the total projected attendance levels for each site. The Table shows estimated attendance immediately after the facility is opened.

5.4.1 Local Residents

The closer the Crystal Palace is built to the downtown area, the higher the level of local residents who are likely to visit the facility. A downtown attraction has the advantage of drawing very large numbers of additional "casual" visitors who would otherwise not attend it. These groups may include people who work downtown, shoppers and other visitors to the area.

Comparable facilities such as the Crystal Garden and Bloedel Conservatory show relatively low attendance levels among local residents. However, neither of these facilities offer seasonal displays such as the Mum Show. By staging seasonal displays, the Crystal Palace would be an on-going attraction to a significant number of local visitors.

Commonwealth Square is the most central of the four alternative locations. It is also the cultural and recreational centre of the City with Hamilton Place and the Art Gallery already on the site, and Copps Coliseum within walking distance. The location therefore affords a Crystal Palace a high degree of visibility and accessibility to a larger number of people.

In terms of public transportation, this site is the most publicly accessible one. This is especially important for the elderly residents who would probably represent the largest segment of local visitors to the facility.

Our estimates for local annual visitation are as follows:

- 30,000 visitors to the Mum Show
- 30,000 visitors to the other two floral shows
- 20,000 visitors during the rest of the year

Therefore we are projecting that a total of 80,000 local residents would visit the shows and permanent displays at Commonwealth Square. The Mum Show is an established yearly event and is therefore likely to attract more people than each of the other new seasonal shows.

We are assuming that a new building with a proper display area that is centrally located would offset any decrease in attendance caused by admission and parking charges.

Local attendance at Gage Park is projected at 65,000 visitors and broken down as follows:

- 30,000 visitors to the Mum Show
- 20,000 visitors to the other two floral shows
- 15,000 visitors during the rest of the year

We base our estimates on the assumption that the Mum Show will continue to draw current levels of local visitors. In addition, we are assuming that people attending events held at Gage during the summer may also wish to visit a Crystal Palace. A possible example is the Festival of Friends which attracts 300,000 people. If only 5% of those people decided to visit the Crystal Palace, that would represent 15,000 visitors.

It will take some time before Confederation Park becomes established as a year-round destination for local residents. While the park was already attracting 150,000 paid visitors in 1985, most of the attendance occurred during the summer since existing attractions are outdoor water slides and pools. During the winter, activity at the park is minimal and, in fact, there is no public transportation to the Park during this season. If a Crystal Palace were to be built at this Park, it would be essential beforehand to ensure that provisions were made to extend bus service year-round.

Assuming that regular public transportation is available during the whole year, we estimate attendance by local residents at 60,000 at Confederation Park. A breakdown of this projection is as follows:

- 20,000 visitors to the Mum Show
- 20,000 visitors to the other two floral shows
- 20,000 visitors during the rest of the year

McQuesten Park has the potential to draw significant levels of local visitors in the long-term. There are already plans to establish the site as a centre for multicultural gardens which would compliment a Crystal Palace. However, until these plans are implemented, McQuesten is unlikely to match the levels of local visitors that would attend a facility at Commonwealth Square or at Gage Park. In the short term, we estimate that local attendance patterns would be similar to those at Confederation Park. However, once the site is fully developed, it is reasonable to assume that these levels would be almost as high as Commonwealth Square's.

5.4.2 Motor Coach Tours

Most of the motor coach tours that visit the Region in early November stop over at the Mum Show. However, as discussed in section 3.2.2, the primary season for motor coach tours is between spring and fall. Although the Mum Show is held in November, which is one of the least popular months for motor coach tours, the show is attracting almost 3,000 visitors on such tours each year.

If the Crystal Palace stages three major floral shows (and possibly some smaller ones) it would attract motor coach tours throughout the year. By staging shows in the spring and summer months, the facility would likely influence additional tours to visit the City.

We estimate that the Crystal Palace would attract about 15,000 visitors annually coming on motor coach tours, if the facility were located at Commonwealth Square or Gage Park. Visitation levels at the other two sites would likely be lower - we estimate 10,000 - in the short-term since they are currently offering a more limited range of activities than the downtown area. However, once development plans are implemented in both Confederation Park and McQuesten Park, visitation levels from motor coach tours would be about the same as for Commonwealth Square or Gage Park.

5.4.3 Convention Visitors

A Crystal Palace at Commonwealth Square will attract a much larger number of convention delegates and their spouses than at any of the other sites. The reasons for this include the following: the proximity of the Square to downtown Hotels where most of the convention visitors stay; the Crystal Palace would be adjacent if not adjoining to the Convention Centre and as a result, this location would also create opportunities to hold regular Convention Centre activities at the Crystal Palace; convention visitors spend most of their time in the downtown area and can more easily fit a visit to the Crystal Palace if it were nearby.

Our discussions with HECFI indicate that there are excellent opportunities to hold Convention Centre activities at the Crystal Palace. A similar relationship could also be arranged with downtown hotels hosting conventions.

Keeping this in mind, we estimate that at least 50% of the delegates coming to Hamilton will either visit or participate in an activity held at the Crystal Palace on Commonwealth Square. This represents about 30,000 delegates per year. In

addition, we estimate that 80% of the delegates' spouses are likely to visit or attend functions at the Crystal Palace which represents almost 25,000 people.

Gage Park would attract the next greatest number of convention visitors. This assumption is based on the proximity of the site to the downtown core. We estimate that at least two-thirds or 20,000 of the delegates' spouses would visit the Crystal Palace. As to the delegates themselves, we estimate that about 20% would be visitors. Delegates tend to be busy during the day attending conferences and therefore have less opportunity to venture away from the area of their hotel or the Convention Centre.

Confederation Park and McQuesten Park would probably draw a significant number of the delegates' spouses but few of the delegates themselves. We estimate that, despite the distances from their hotels, one-half of the delegates' spouses would visit a Crystal Palace at either Park. However, we believe that not more than 10% of the delegates would have the opportunity to visit the facility. Even when the development of the Parks has been completed, a Crystal Palace in either Park will attract significant numbers of delegates' spouses but not the delegates themselves.

5.4.4 Other Tourists

Tourists visiting the Region through conventions or motor coach tours represent only a small fraction of the estimated 1.2 million total visitors to the Region annually. A large number of these tourists come to the Region from surrounding cities for one day only to visit local attractions.

We estimate that at least 5% of these 1.2 million tourists would visit a Crystal Palace located at Commonwealth Square which represents 60,000 people. For the three sites, we are estimating at a slightly lower rate - 4% or 50,000 people.

Commonwealth Square would attract more tourists than the other sites because of the large number of other nearby attractions. Visitors to the Art Gallery, the Copps Coliseum, Hamilton Place, Dundurn Castle, and a number of other downtown attractions are more likely to visit a Crystal Palace at Commonwealth Square than at the other alternative sites.

5.5

PARKING

We estimate that the Crystal Palace would generate a need for a nearby parking lot or garage capable of handling 250 cars during peak periods (flower shows). At other times, space for about 150 cars would be sufficient.

At Gage Park, there is currently a parking lot for 150 cars. If a Crystal Palace is built on this site, provisions would have to be made for at least another 100 spaces. During the Mum Show, the baseball diamond adjacent to the greenhouses is used as "bulge" additional parking space. Part of this baseball diamond could be converted into a permanent parking lot. The alternative is to build a new parking lot near to the park. We understand that there may be suitable space available on Gage Avenue South, across from Gage Park.

At McQuesten Park there is enough space to build a 300-400 car parking lot to serve both the Crystal Palace and the Multicultural Gardens.

We understand that Confederation Park has ample parking space to accommodate visitors to the Crystal Palace. However, the Park is currently charging \$4.50 admission per vehicle from spring to fall and \$1.25 during the winter. Given the Park's relatively remote location, this parking cost would be too high for patrons of the Crystal Palace. The RBG, for example, charges \$2.50 for parking while the Bloedel Conservatory, which is located 15 minutes

away from downtown Vancouver offers free parking. If Confederation Park is the site selected, then the City would need to hold discussions with the Park to determine how to exempt or reduce parking costs for Crystal Palace visitors.

Although Commonwealth Square is the busiest location from a traffic point of view, our discussions with Hamilton's Parking Authority indicate that parking would not be a problem for the following reasons:

- o The present garage at Commonwealth Square accommodates 856 cars. It is seldom full even during weekdays;
- o The City's planning budget includes provisions to build 5 additional parking garages for the downtown area over the next 5-6 years. One of the new garages will be part of the City Hall expansion and will hold 850 cars. This facility will be open for parking during the evening;
- o Downtown garages are normally underused in the evenings except when a number of entertainment events are taking place at the same time. When this occurs, the York Boulevard Parkade, with space for 830 cars, is used to accommodate any overflow from the Commonwealth Square garage.

Hamilton's Parking Authority coordinate events with local entertainment facilities to minimize traffic congestion. For example, a bus drop off is regularly arranged for Hamilton Place and for the Convention Centre when these facilities host major activities or events.

5.6 ADMINISTRATION AND MANAGEMENT

A Crystal Palace would need a director to manage and promote the facility. The ideal candidate would have experience in business administration and in botany. In addition, the director would need a full-time secretary/assistant.

The director would be accountable to the City's Public Works Department. However, at Confederation Park, the Region would be the ultimate governing authority unless the City wished to negotiate jurisdiction over the Crystal Palace.

A minimum of two full-time gardeners would be required and provisions should be made in the expense budget to allow for the hiring of part-time help during peak periods.

We recommend that the Volunteer Committee play an active role in the on-going operation of the facility. This could involve volunteering time as cashiers, guides for large groups visiting the displays, and assistance in hosting the flower shows as is currently the practice at the Mum Show.

5.7 MARKETING

The experience of comparable facilities indicates that adequate promotion is essential to ensure the success of a Crystal Palace. Advertising is particularly important to attract tourists from surrounding areas. In their study of the local tourism industry, Peter Barnard Associates concluded that the Region suffers from a lack of promotion. The study included a 1985 survey to determine the primary information sources influencing visitors to the Region. At the top of the list was "word-of-mouth" cited by 49% of respondents.

During a more recent survey (1989) conducted by the RBG, 42% of respondents indicated that they received information about the RBG through "word-of-mouth". The next highest answer was "brochure" which was cited by only 15% of respondents.

These findings show that almost half of the visitors to the Region are not being influenced by current promotional efforts of Hamilton or of the attractions themselves. It also appears that more aggressive marketing campaigns are needed to attract visitors from just outside the Region.

Table 6

**PROJECTED OPERATING BUDGET FOR THE FOUR POTENTIAL SITES
OF A CRYSTAL PALACE (\$)**

EXPENSES	Common- wealth Sq.	Confeder- ation Pk.	Gage Park	McQuesten Park
Salaries	150,000	150,000	150,000	150,000
Building Maintenance	190,000	190,000	150,000	190,000
Maintenance of Permanent Display	30,000	20,000	20,000	20,000
Seasonal Shows	530,000	500,000	500,000	500,000
Marketing/Office supplies	<u>50,000</u>	<u>40,000</u>	<u>40,000</u>	<u>40,000</u>
TOTAL	950,000	900,000	860,000	900,000

REVENUES	Common- wealth Sq.	Confeder- ation Pk.	Gage Park	McQuesten Park
General Admission & Admission to Shows	525,000	265,000	300,000	250,000
Restaurant/tea room	25,000	*	*	*
City's existing support to Mum Show	300,000	300,000	300,000	300,000
Memberships	<u>50,000</u>	<u>50,000</u>	<u>50,000</u>	<u>50,000</u>
TOTAL	900,000	615,000	650,000	600,000
Additional Subsidy Required from Hamilton to Balance the Budget	50,000	285,000**	210,000	300,000**

* We are assuming that any food facility that is established at either one of the park sites will be financially self-sufficient in the initial years.

** The level of this subsidy would decrease substantially once the site is fully developed and is able to generate additional revenues.

Hamilton has recently strengthened their efforts at promoting local attractions which is certain to have a positive impact on a proposed Crystal Palace. However, the Palace itself needs to devote a minimum of 5% of its budget to target specific groups of potential visitors.

5.8 PROJECTED OPERATING BUDGET

We provide preliminary estimates for the operating budget of a Crystal Palace for each of the four locations. We note that the final budget will depend on the scale of the components that are included. Preliminary budget estimates for the first year of operation are included in Table 6, opposite. An inflationary increase of about 5% should be allowed for ensuing years. It is also important to note that the operating budgets for Confederation Park and McQuesten Park would change drastically in the long term once the sites were fully developed and became established as major public attractions.

5.8.1 Expenses

The seasonal floral shows will be the greatest expense items of the Crystal Palace. Judicious management of the shows is crucial to the viability of the Crystal Palace. As discussed in Section 5.3 above, we recommend that the seasonal events be phased in on a smaller scale in the incipient years and expanded gradually over subsequent years as the facility gains in recognition and attendance. We are allowing a budget of \$200,000 for the Mum Show and \$150,000 each for two other shows at a new Crystal Palace. If the facility is built on Commonwealth Square, there will be an additional cost of \$30,000 to move plants and flowers from off-site greenhouses.

Building maintenance costs (heating, electricity, security, etc) varies widely among comparable facilities that we reviewed. The facility for which we have the most complete breakdown of costs is the Crystal Garden where building maintenance costs are running at under \$7 per square foot. We are, however, allowing for \$8 per square foot for the Crystal Palace. Our estimates are also based on a Crystal Palace that is 23,800 sq ft in size at Commonwealth Square, 19,000 sq ft at Gage Park and 24,000 sq ft at the remaining two sites¹. Calculations of maintaining ancillary greenhouses are included in the estimates to stage the seasonal shows and the upkeep of the permanent display.

Overhead salaries are also significant expense items. We estimate that a reasonable salary and benefits package for a director of the facility would be \$60,000. Two full-time gardeners would be needed to maintain the permanent displays and assist with seasonal shows at a cost of \$60,000. We are also allowing \$30,000 for a secretary/assistant to the director. Other duties at the Crystal Palace, including cashiers, public guides to the displays (permanent and seasonal) would be provided by the Volunteer Committee. This approach has worked successfully at the Royal Botanical Gardens and the Mum Show.

Marketing costs are calculated at 5% of the facility's budget. Costs of maintaining a permanent horticultural display has been calculated at \$30,000 for the Commonwealth Square site. This is comparable to the costs incurred at Bloedel Conservatory and the Crystal Garden each of which source plants off-site to maintain their permanent displays. At the other locations, we have allowed for \$20,000 to maintain the permanent displays.

We are assuming that this will be a non-profit public municipal facility which will not pay taxes.

5.8.2 Revenues

Admission charges will be a principal source of revenues. Our review of other facilities indicates that admission charges range from 0 to over \$5.00. Respondents to a survey conducted last year at the RBG were asked what they were willing to pay in admission to attend the RBG's gardens. The average dollar amount given was \$2.57 per person.

At the Crystal Palace, we recommend that admission charges should be higher during seasonal shows. Seniors, children and students should be charged at a lower rate. Following these guidelines, \$2 per visitor is a reasonable overall average admission to aim for. However, at Commonwealth Square average admissions prices per visitor could be somewhat higher given the projected high attendance of conventions visitors. Access to the Crystal Palace should be included in the convention visitors' overall fees. We are therefore assuming that average fees at the Square would be \$2.50 per visitor.

The other major source of revenue for the Palace would be the City of Hamilton. Currently, the City provides about \$300,000 of financial support directly and in kind, to the staging of the Mum Show. We are assuming that this is the minimum level of support that the City would continue to provide to the Crystal Palace. In addition, we have calculated that a further subsidy would be needed from the City to make the Palace viable. The level of such a subsidy varies from about \$50,000 at Commonwealth Square to \$300,000 at McQuesten Park. However, either McQuesten Park or Confederation Park could become less of a burden as each of these sites becomes more fully developed. The addition of other public attractions would cause increases in attendance at the Crystal Palace. As a result, the difference in the subsidies required between

these two sites and Commonwealth Square would narrow considerably in the long term.

Subsidies from the City would be primarily in the form of facilities to grow plants and flowers and the necessary manpower to do this.

A food facility at Commonwealth Square is likely to generate a positive cash flow. The experience of the Crystal Gardens suggests that a tea room or restaurant in a downtown location should generate at least \$25,000. At the other three sites, we recommend that a private interest should be given the food concession and pay a percentage of the net profits to the Palace. This would protect the Crystal Garden against any potential losses. We estimate that in the short term, the food facilities at sites other than Commonwealth Square will break-even.

The Crystal Palace should follow the lead of comparable facilities, like Fuqua and the RBG, and aim to cover part of the expenses from interested supporters. At the Atlanta Botanical Gardens, for example, membership dues account for over 30% of the ABG's operating budget. Given the extensive experience and network of contacts of the Mum Show Volunteer Committee, we believe that this organization could take the lead in developing a membership base.

5.9

CONCLUSIONS

Commonwealth Square

This site represents the concept of a Crystal Palace at its most formal, elegant and expensive. It would be excellent for formal civic receptions, a sophisticated food facility and a gift shop. This highly visible location, surrounded by major public attractions offer the greatest potential for the facility to become a symbol of the City.

While a Crystal Palace at this site would require a larger operating budget than the other locations, it would also generate the highest levels of attendance. As a result, the level of financial assistance required from the City would be less at this site than at the others. Moreover, the net level of City assistance will be much lower if parking revenues generated by the Crystal Palace are taken into account.

Confederation Park

This site represents a more modest concept than that impelled by the nature of Commonwealth Square. However, if a long term approach is adopted, higher degrees of the four elements are possible. Once the Region proceeds with development plans for the park, and public transportation during the winter is available, this site could become a year-round public destination.

Gage Park

This is the best site for a simpler and less expensive concept. Additional public building would be primarily in the form of a formal display greenhouse to compliment existing facilities. Given the historic nature of the Park, additional components or future expansion of the site would probably be severely limited. Since no other major attractions exist nearby and since none are planned, this

site is least likely to establish the Crystal Palace as a symbol of the Hamilton. As a result, in the long term this site's attendance levels would be lower than at the other alternative locations.

McQuesten Park

This site offers a good long-term opportunity. Although the park is currently undeveloped, the City plans to create a Multicultural Gardens over the next few years and a freeway passing near the area is also planned. An advantage of building the Crystal Palace close to the Multicultural Gardens would be a sharing of facilities, particularly ancillary greenhouses. However, at this site the Crystal Palace's full impact would occur only towards the end of the decade.

While a formal floral greenhouse would be immediately required, it may be prudent to phase in a restaurant or gift shop gradually. In addition, a formal civic reception area is presently not appropriate on this site, although this too may be phased in if the park established itself as a new cultural centre of the City.

Until the Park is fully developed, attendance will be lower than what it would be at Commonwealth Square; therefore, a higher level of assistance from the City would be required, particularly if the Palace is to hold at least three floral shows each year.

6. PROJECTED SOCIAL AND ECONOMIC IMPACT OF THE CRYSTAL PALACE

We have conducted an assessment of the social and economic impact for Hamilton of the proposed Crystal Palace. We have used the Commonwealth Square site as our model. A downtown location would produce the greatest impact since attendance levels would be relatively higher than at the other sites - as is discussed above.

The projected operating budget for a Crystal Palace at Commonwealth Square suggests that:

- o total salaries of workers directly connected with the facility's operations will be approximately \$150,000;
- o in addition, the Crystal Palace will purchase each year over \$600,000 in non-wage expenditures locally;
- o each dollar of local expenditure made by the Crystal Palace will generate an estimated \$0.65;
- o a total of 4 full-time jobs will be directly created at the Crystal Palace and 13 additional full-time jobs through spin-off effects as a result of the facility;
- o the total economic impact (direct and indirect) for Hamilton will be over \$1.2 million.

Details of the assumptions used to determine the economic projections are provided in Appendix II.

A Crystal Palace would also produce the following positive effects for Hamilton:

- o an increase in the City's profile which will likely bring about an increase in conventions attracted to Hamilton;

A Crystal Palace would enhance the City's ability to market itself to conventions. This is particularly true of the Commonwealth Square site. HECFI believe that such a facility would improve the City's chances of attracting additional conventions. If the facility were located at one of the other sites, it would still be an important attraction for the convention delegates' spouses;

- o a rise in the demand for nearby restaurants and retail stores, particularly gift shops;
- o an increase in attendance at nearby attractions; the Art Gallery is an example of a nearby attraction that would benefit from a Crystal Palace being built at Commonwealth Square; likewise, the proposed Multicultural Gardens would attract additional visitors if the Crystal Palace were built at McQuesten Park;
- o a more attractive City for its residents.

APPENDIX I:

CONTACT LIST

APPENDIX I: CONTACT LIST

CONTACT LIST

Agostino, Dominic (Alderman)

Baker, Peter (General Manager, Hamilton Parking Authority)

Cherry, Jill (Former Manager of the Allan Gardens)

Christensen, Kevin C., (Waterfront Project Co-ordinator)

Chrystian, Bob (Manager of Parks)

Corsini, Guy (Operation Manager, Hamilton Parking Authority)

Crammond, Ann Lyon, (Executive Director of the Atlanta Botanical Gardens)

Cummings, Glen, (Former Director, Hamilton Art Gallery)

Firth-Eagland, Chris (Development Co-ordinator)

Foster, Jane (Tourism Co-ordinator, Visitor & Convention Services)

Gallagher, John (Alderman; Vice Chairman, Parks & Recreation Committee; Chairman of HECFI)

Garwood-Jones, Trevor (Architect, Hamilton Art Gallery, Hamilton Convention Centre)

Havelka, Marilyn (Manager of Cultural Services, Culture and Recreation Department)

Hinkley, Brian (Alderman)

Houghton, Allen (Director of Crystal Garden, Victoria)

Jackson, Tom (Alderman)

Johnson, Vivian (Jackson Square)

Konkle, Scott (Director of Planning and Engineering, Hamilton Region Conservation Authority)

Lavender, Beth (Environmental Planner, Mountain East-West and North-South Transportation Corridor)

Leupen, Robert (Superisor of the Bloedel Conservatory)

Livingston, Jordan (Chairman, Hamilton Art Gallelry)

Contact List cont'd.

Macaluso, Gabe (Managing Director & CEO, HECFI)

McChesney, Mary (Tourism Co-ordinator, Visitor & Convention services)

McCulloch, Bill (Alderman)

McDermott, Joanne (Parks Designer)

McQuesten, Bev (Manager of the Allan Gardens)

Morrow, Eleanor (Chairperson, Mum Show and Member of Crystal Palace Committee)

Muir, Don (Member of Crystal Palace Committee)

Oates, Marc (Manager of Administration services, RBG)

Paterson, Allen (Director of the Royal Botanical Gardens)

Pavelka, Joe (Director of Public Works)

Pearcell, Bob (Former Assistant Administrator, Hamilton Psychiatric Hospital)

Pook, Jim (Horticulturist, City of Hamilton)

Powell, Bill (Hamilton Wentworth Creative Arts)

Renshaw, Silvia (Economic Development Department, Regional Municipality of Hamilton Wentworth)

Seager, Ernie (Chairman of the Hamilton Crystal Palace Committee)

Towsley, Chuck (Property Manager, Hamilton Harbour Commission)

Vanderbrug, Ben (General Manager, Hamilton Region Conservation Authority_)

Watson, Michael (Manager, Real Estate Division)

DOCUMENTS REVIEWED: (see also page 3 Marketing Study)

Memorandum re: Sam Lawrence Park Upgrading to Mr. J. G. Pavelka P.Eng.
Director of Public Works May 1989.

Notes Prepared by the City of Hamilton Parks Department on T.B. McQuesten
Park Nov. 1989.

Red Hill Creek Open Space and Recreation Master Plan Draft Final Report June
1989

Moore/George Associates Inc.

Landscape Restoration Feasibility Study for Dundurn Castle, City of Hamilton,
Heritage Services, Culture and Recreation Department Nov. 23, 1987 The
Landplan Collaborative Ltd.

Maps on the Mountain East-West and North-South Transportation Corridor.

Construction drawings, Lloyd D. Jackson Square Underground Parking Garage,
E.A. Barton & Associates Ltd., Fenco Engineering Ltd.

Confederation Park Master Landscape and Development Plan, Hamilton Region
Conservation Authority Feb. 1985

Moore/George Associates Inc.

APPENDIX II: ECONOMIC IMPACT MODEL

SOCIAL AND ECONOMIC IMPACT MODEL

A.1 Types of Economic and Social Impacts

In this Appendix, we estimate the likely benefit of the Crystal Palace in terms of its social and economic impact upon Hamilton. The estimate of quantifiable benefits is made in terms of household income, which consists of wages and salaries, business profits, rent and interest. It is household income that is used as a measure of personal benefit to the residents of the area. Additionally, we examine the employment-related impacts of the proposed development.

The generation of household income takes place in three basic stages:

1. Direct Household Income: Direct household income is generated by a corporation paying wages and salaries, etc., for various services -- it is the income received by residents directly from the industry in question.
2. Indirect Household Income: Indirect household income is generated by the facility under study buying inputs from other local industries or firms, thus, creating production and hence, household income.
3. Induced Household Income: Induced household income is generated by the re-spending of direct and indirect household income within the region. This is a repetitive cycle with decreasing magnitude.

As each of these categories is "household income", the direct, indirect and induced amounts can be summed to yield a total estimate of economic benefit. This total amount can then be compared to the operating cost to determine the "multiplier" effect of the Crystal Palace's expenditures.

A.2 Economic Impact of Operations

There are several ways in which the Crystal Palace, once in operation, may have beneficial economic impacts upon the local economy. These include:

- o by directly creating jobs, and thus injecting additional household income into the area (direct household income);
- o by purchasing supplies locally, thus creating additional household income in the area (indirect household income);
- o by lengthening the stay of visitors in the area, thus increasing the probability of their spending money, thereby creating additional business profits in the area (indirect household income);
- o by attracting new visitors to the area, who in turn spend money locally, and thus create additional business profits (indirect household income);
- o by creating new job opportunities in the area associated with businesses servicing the longer-staying and/or new visitors attracted to the area, and thus injecting additional household income into the area (indirect household income);
- o the businesses mentioned above re-spending locally some portion of their revenues earned from the project (induced household income);
- o employees on jobs directly and indirectly created by the Crystal Palace re-spending their earnings on various goods and services (induced household income);
- o the re-spending of business profits upon individual goods and services (induced household income); and
- o the re-spending of all direct and indirect household income in the area on goods and services (induced household income).

The major generators of these impacts are discussed in greater detail below.

A.3 Wages and Salaries of Crystal Palace Employees

The direct household income associated with the Crystal Palace in a typical year of operation is simply the wages and salaries paid to the additional employees associated with the facility. As specified in Table A1, these economic benefits will be on the order of \$150,000 for employees directly associated with the running of the facility.

A.4 Direct Purchases by the Crystal Palace

Indirect household income associated with the Crystal Palace in a typical year of operation will come from a variety of sources. First among these is the direct purchase of supplies locally (i.e. in the City of Hamilton, primarily by the facility). In our estimates of operating costs, we assumed that annual non-wage related expenditure of the Crystal Palace would approximate \$760,000.

Assuming that most (e.g. 80%) of these purchases will come from the local area we can estimate the amount of money spent locally to be on the order of \$608,000. An example of a locally-sourced service would be the setting up of the flower shows by personnel from the Parks Division.

A.5 Expenditure of Visitors to Hamilton

The second category of indirect household income is related to the expenditure of tourists at the Crystal Palace and in the area. While it is difficult to measure with any degree of precision the exact nature of these benefits, we have attempted to quantify them in this report.

We estimate that tourists and convention visitors will pay \$325,000 in admission to the Crystal Palace. We are also allowing for an additional expenditure in the area by tourists that visit the Crystal Palace. For tourists arriving on motor coach tours, the Crystal Palace is likely to be their primary attraction. It is reasonable to assume that, on average, each person from a coach tour will spend an additional \$5 on food and gifts in nearby shops. We estimated that there would be 15,000 such tourists therefore their additional expenditures would total \$75,000. We also projected that the Crystal Palace at Commonwealth Square would attract an additional 60,000 tourists. It is not possible to estimate how many of these tourists would be visiting Hamilton

primarily to see the Crystal Palace. However, it is reasonable to assume that the Crystal Palace would influence some tourists to come to downtown Hamilton, particularly during the flower shows. Moreover, the facility would probably persuade some of these tourists to stay in Hamilton longer. We are, therefore, assuming that the Crystal Palace would be responsible for at least \$1 in extra expenditures in Hamilton by these tourists or \$60,000.

Following these assumptions, total related "visitor expenditure" would total \$460,000.

We are not including expenditures made by convention visitors although it is arguable that the Crystal Palace would improve the City's prospects for attracting additional conventions. If the Crystal Palace influenced only one additional convention to select Hamilton, the overall economic benefits produced would be considerably higher than those projected here.

A.6 Induced Household Income

The re-spending of direct and indirect household income constitutes the induced income effect of the Crystal Palace. Because the local economy is relatively highly integrated, with most supplies being purchased inside the area, we recognize that there is a relatively low degree of "leakage" to outside communities present. This will result in a relatively high multiplier effect, as income gets continually re-circulated around the local Hamilton economy.

In order to estimate induced household income, we must make several reasonable assumptions regarding the nature of the Hamilton economy.

Accordingly, we assume that local employees will spend 20% of their salaries on local goods and services and that 45% of local revenues (from direct

purchases of goods and services by the Crystal Palace, and from visitor expenditures) are re-spent purchasing supplies, and of these, 80% are purchased in the City of Hamilton (in other words, 36% of total business revenues are re-spent on supplies in the City). Further, we assume that every \$100,000 of purchases made from local businesses will generate or support 1 job. We believe that these are conservative assumptions.

Using these assumptions in our economic impact model, the estimated total additional or "induced" household income in the local area as a result of the operations of the Crystal Palace is almost \$500,000.

A.7 Summary of Economic Impact of Operations

Our economic impact model estimates two multipliers associated with the operations of the Crystal Palace. These are defined as:

income multiplier - the additional household income (including wages and a salaries, and business profits) arising locally from direct expenditures

employment multiplier - the additional amount of labour time arising in the local area as a result of jobs created directly by the facility.

The results of the model are shown in Table A1. They indicate that the income multiplier will be on the order of .65. That is, each dollar of local expenditure by the Crystal Palace (on both wages and the cost of goods) generates an additional \$0.65 in household income in the local economy. Total additional household income in the local area (including that directly attributable to the Crystal Palace) in the first year of operation will approximate \$1,000,000.

The job multiplier is estimated to be 3.35. That is, each full-time job equivalent directly created by the Crystal Palace will generate an additional 3.35 job

equivalents in the City. We estimate that the Crystal Palace will directly create about 13 full-time job equivalents.

A.8 Economic Impact of Construction

In addition to these on-going economic impacts, there will be a variety of construction-related impacts resulting from the construction of the Crystal Palace. These can be analyzed according to the same general framework of direct, indirect and induced economic impacts.

A standard rule of thumb for estimating the job creation potential of new construction projects is one man-year of employment for direct site labour created for every \$60,000 of capital cost.

For example, if the total estimated capital cost for the facility is approximately \$4 million, this would thus create 67 man-years of employment. This can be translated into direct household income by a simple assumption that each man-year of employment would pay an average of \$20,000. Direct household income would thus be \$1.3 million.

The extent to which these benefits will accrue to the City of Hamilton will largely depend upon the choice of contracting firm. We assume that a local firm will be chosen for the construction of the Crystal Palace, thus maximizing the extent to which economic benefits will be realized in the surrounding region.

TABLE A1: IMPACT MODEL

ASSUMPTIONS			INTERPRETATION		
TOTAL ADDITIONAL HOUSEHOLD INCOME IN THE LOCAL AREA (INCLUDING THAT DIRECTLY ATTRIBUTABLE TO THE DEVELOPMENT) IS \$0.49 MILLION			TOTAL ADDITIONAL HOUSEHOLD INCOME IN THE LOCAL AREA (INCLUDING THAT DIRECTLY ATTRIBUTABLE TO THE DEVELOPMENT) IS \$0.49 MILLION		
A	1 Full-Time Jobs	4	TOTAL ADDITIONAL INCOME= 489340.6	EACH DOLLAR OF EXPENDITURE BY THE DEVELOPMENT ON WAGES AND COST OF GOODS GENERATES AN ADDITIONAL \$0.65 IN THE LOCAL ECONOMY	
B	2 Ann. Sal-Park Emp	37500		EACH JOB DIRECTLY CREATED BY THE DEVELOPMENT GENERATES AN ADDITIONAL \$3.35 JOBS IN THE LOCAL ECONOMY	
C	3 Ann. Sal-Others	20000		SUMMARY	
D	4 & Salary Re-Spent	0.2		DIRECT	MLTPLR.
E	5 & Loc. Ind Purch.	0.36		4	3.35
F	6 Tourist Expend.	460000		13.41	17.41
G	7 Palace Expend.	608000		INCOME	
H	8 Jobs/Bus. Revenue	100000		(\$000)	
I	9 Cost of Goods	0.3		-Wages	\$150
J	10 Retained Profits	0.33		-Expend	\$608
10	DIRECT EMPLOYMENT INCOME	150000	EMPLOYMENT MULTIPLIER= 3.351648	-Total	\$758
INDIRECT EMPLOYMENT INCOME			TOTAL		
11	Total Purchases	1098000	SUMMARY		
12	New Jobs Created	10.98	DIRECT MLTPLR. ADDITNL TOTAL		
13	New Hhld. Income	219600	JOBS 4 3.35 13.41 17.41		
14	New Bus. Income	181170	INCOME (\$000)		
15	SUM INDIRECT INC.	400770	-Wages \$150 0.65 \$97 \$247		
INDUCED HOUSEHOLD INCOME			-Expend \$608 0.65 \$393 \$1,001		
FIRST ROUND			-Total \$758 0.65 \$489 \$1,247		
16	Total Emp. Purch.	43920	SECOND ROUND		
17	Total Bus. Purch.	118584	24 Total Emp. Purch. 7949.52		
18	Re-Spending Profit	36234	25 Total Bus. Purch. 21463.70		
19	Total Purchases	198738	26 Re-Spending Profit 6558.354		
20	New Jobs Created	1.98738	27 Total Purchases 35971.57		
21	New Hhld. Income	39747.6	28 New Jobs Created 0.359715		
22	New Bus. Income	32791.77	29 New Hhld Income 7194.315		
23	Total First Round	72539.37	30 New Bus. Income 5935.310		

31	Total Second Round	13129.62	
32	INDUCED \$ MULT.	0.181	
33	Third Round	2376.462	
34	Fourth Round	430.1396	
35	Fifth Round	77.85528	
36	Sixth Round	14.09180	
37	Seventh Round	2.550616	
38	Eighth Round	0.461661	
39	Ninth Round	0.083560	
40	Tenth Round	0.015124	
41	TOTAL INDUCED INC.	88570.65	
42	INDUCED JOB MULT.	0.181	
43	Third Round	0.065108	
44	Fourth Round	0.011784	
45	Fifth Round	0.002133	
46	Sixth Round	0.000386	
47	Seventh Round	0.000069	
48	Eighth Round	0.000012	
49	Ninth Round	0.000002	
50	Tenth Round	0.000000	
51	TOTAL INDUCED JOBS	2.426593	

APPENDIX III:

INTERIM RESULTS OF SITES REVIEW

The twelve sites were reviewed by criteria involving both descriptive judgements and mandatory requirements. If either of the mandatory requirements were not met, the site was considered unacceptable and deleted. Six sites were dropped under the mandatory criteria. Of the six remaining, the four with the highest ratings - T.B. McQuesten Park, Commonwealth Square, Confederation park and Gage Park - indicate good potential and are recommended for more detailed analysis.

1. T.B. McQUESTEN PARK 56

Plans for the development of the park with a multicultural gardens theme, and the location of the east-west extension of the Red Hill Expressway at the northern boundary of the park greatly improve the ratings for most of the criteria (compared with our earlier report of October 11, 1989).

2. COMMONWEALTH SQUARE 55.5

The city centre location a highly desirable site with respect to the development of a public profile and also works well as the Civic Reception Room.

3. CONFEDERATION PARK 47.5

An attractive site which would accommodate the addition of the Crystal Palace program. The Crystal Palace would be a central facility for the confederation Park and its relationship with the many other programmed events will have to be determined.

4. GAGE PARK 45.5

The size and location of the park is amenable to the Crystal Palace program, and the mature planting of the original gardens with the existing greenhouses are attractive features. However, the neighbourhood quality of the park would be affected with the addition of the Crystal Palace.

5. HAMILTON PSYCHIATRIC HOSPITAL GROUNDS 36

This site does not have a prominent location that could be used by the Crystal Palace. Public prominence and accessibility would be difficult to establish.

6. TURNER FARM 34.5

As a rural site it will be extremely difficult to develop a high public profile and to maintain daily visitation.

7. PRINCESS POINT deleted

Due to location in Looters Paradise, owned by the Royal Botanical Gardens, this site is a wildlife sanctuary and not available.

8. DUNDURN AND HARVEY PARK deleted

Plans have started for the restoration of Dundurn Park back to its original landscape.

9. SAM LAWRENCE PARK deleted

Plans have been approved for planting and improvements to this park with a mandate for passive use.

10. FOOT OF JAMES STREET deleted

The Hamilton Harbour Commission intends to continue and expand on the nautical uses already located on this site.

11. MOHAWK ROAD EAST AT MOUNTAIN PARK / UPPER KINGS FOREST deleted

The Upper Kings Forest is reserved for expansion of the Mohawk Sports Park.

12. MOUNTAIN BROW PARK deleted

This site has insufficient area for the Crystal Palace.

T.B. McQUESTEN PARK

0-5 Rating Comments

CRITERIA INVOLVING MANDATORY REQUIREMENTS:

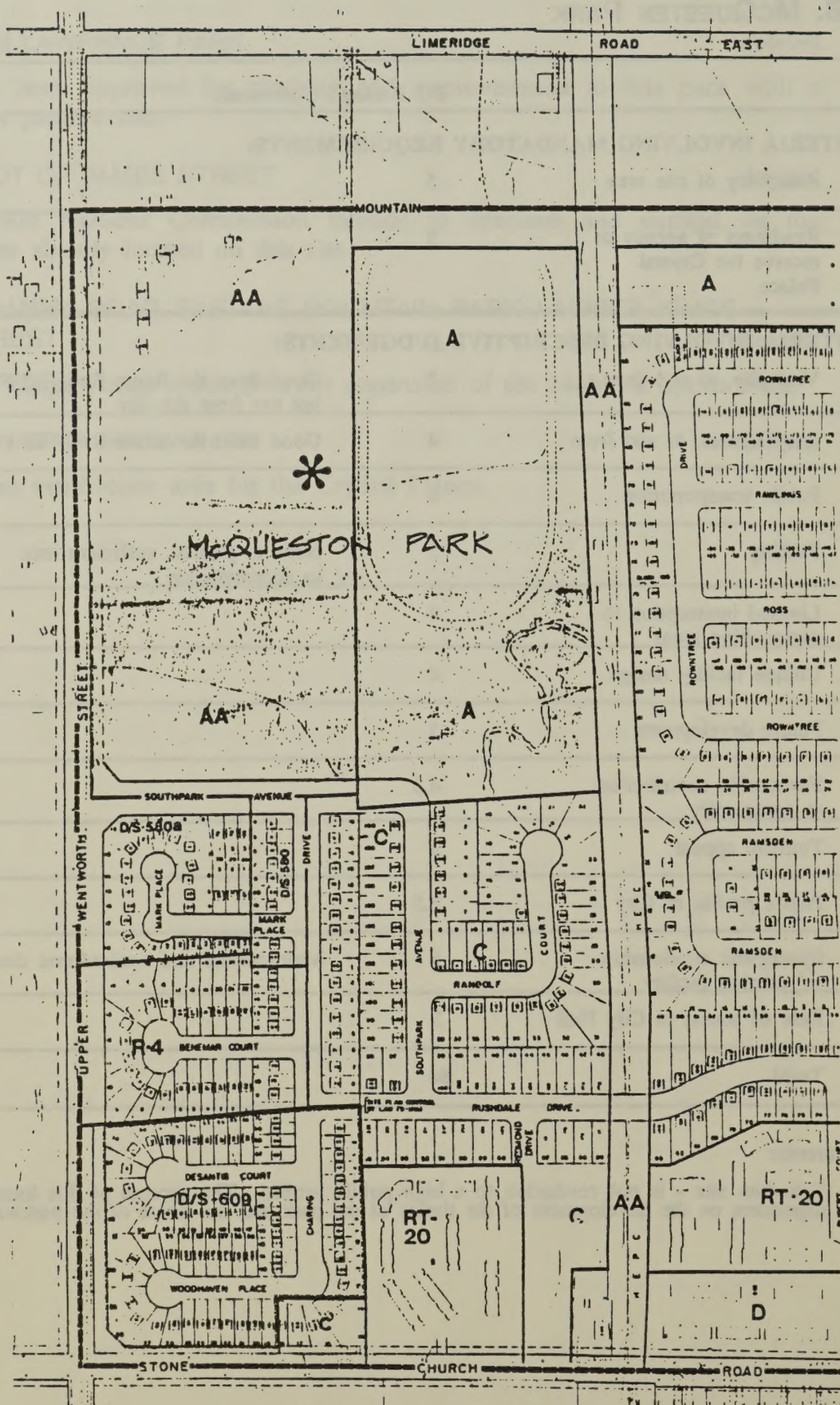
- | | | |
|----|--|---|
| 1. | Adequacy of site area | 5 |
| 2. | Readiness of agency to receive the Crystal Palace. | 5 |

CRITERIA INVOLVING DESCRIPTIVE JUDGEMENTS:

- | | | | |
|-------|---|-----|---|
| 1. | Visibility, to and from | 3 | Good from the future Red Hill Pkwy, but not from the city |
| 2. | Easy Access, to and from | 4 | Good from the future Red Hill Pkwy, |
| 3. | Public transportation | 4 | |
| 4. | Parking | 5 | None at present, sufficient area to accommodate |
| 5. | Limited interruption to surrounding areas | 4 | |
| 6. | Unique facility design | 4 | |
| 7. | Future development | 5 | |
| 8. | Favourable contribution to community | 4.5 | |
| 9. | Tourism appeal | 3 | |
| 10. | Public profile of City | 2.5 | |
| 11. | Synergistic relationship w/ existing facility | 5 | Multicultural and horticultural theme |
| 12. | Ease of access to City Hall | 2 | |
| Total | | 56 | |

Comments:

- Suburban site - is not conducive to a high public profile. The success of this location is dependent on the development of the theme of the park and the future of the parkway.



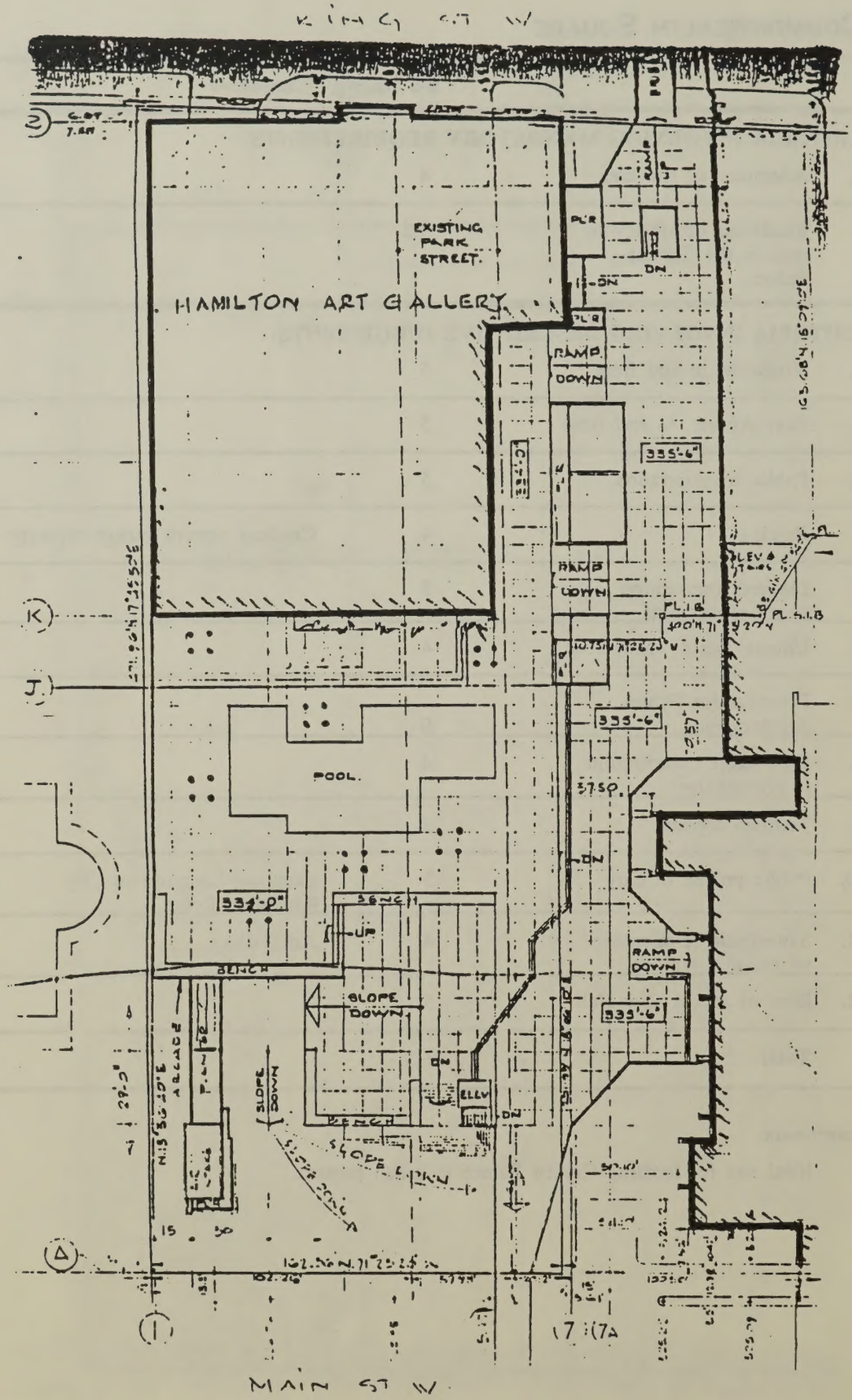
* POTENTIAL LOCATION FOR CRYSTAL PALACE

COMMONWEALTH SQUARE

0-5 Rating Comments		
CRITERIA INVOLVING MANDATORY REQUIREMENTS:		
1. Adequacy of site area	4	
2. Readiness of agency to receive the Crystal Palace.	3.5	
CRITERIA INVOLVING DESCRIPTIVE JUDGEMENTS:		
1. Visibility, to and from	5	
2. Easy Access, to and from	5	
3. Public transportation	5	
4. Parking	4	Confirm present garage capacity
5. Limited interruption to surrounding areas	2	
6. Unique facility design	4	
7. Potential for Future development.	0	
8. Favourable contribution to community	4	
9. Tourism appeal	5	
10. Public profile of City	5	Excellent Location as City Reception Room
11. Synergistic relationship w/ existing facility	4	Art Gallery
12. Ease of access City Hall	5	
Total	55.5	

Comments:

- Ideal site for locating Crystal Palace in urban context.

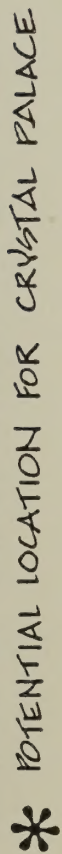


CONFEDERATION PARK

0-5 Rating Comments		
CRITERIA INVOLVING MANDATORY REQUIREMENTS:		
1. Adequacy of site area	4	
2. Readiness of agency to receive the Crystal Palace.	3.5	
CRITERIA INVOLVING DESCRIPTIVE JUDGEMENTS:		
1. Visibility, to and from	3	Good from water and highway but not from City
2. Easy Access, to and from	4	
3. Public transportation	1	Summer only
4. Parking	5	
5. Limited interruption to surrounding areas	5	
6. Unique facility design	4	
7. Potential for future development	3	
8. Favourable contribution to community	3	
9. Tourism appeal	4.5	
10. Public profile of City	2.5	
11. Synergistic relationship w/ existing facility	3	Relationship to other park uses to be developed
12. Ease of access to City Hall	2	
Total	47.5	

Comments:

- Land is not owned by the City.

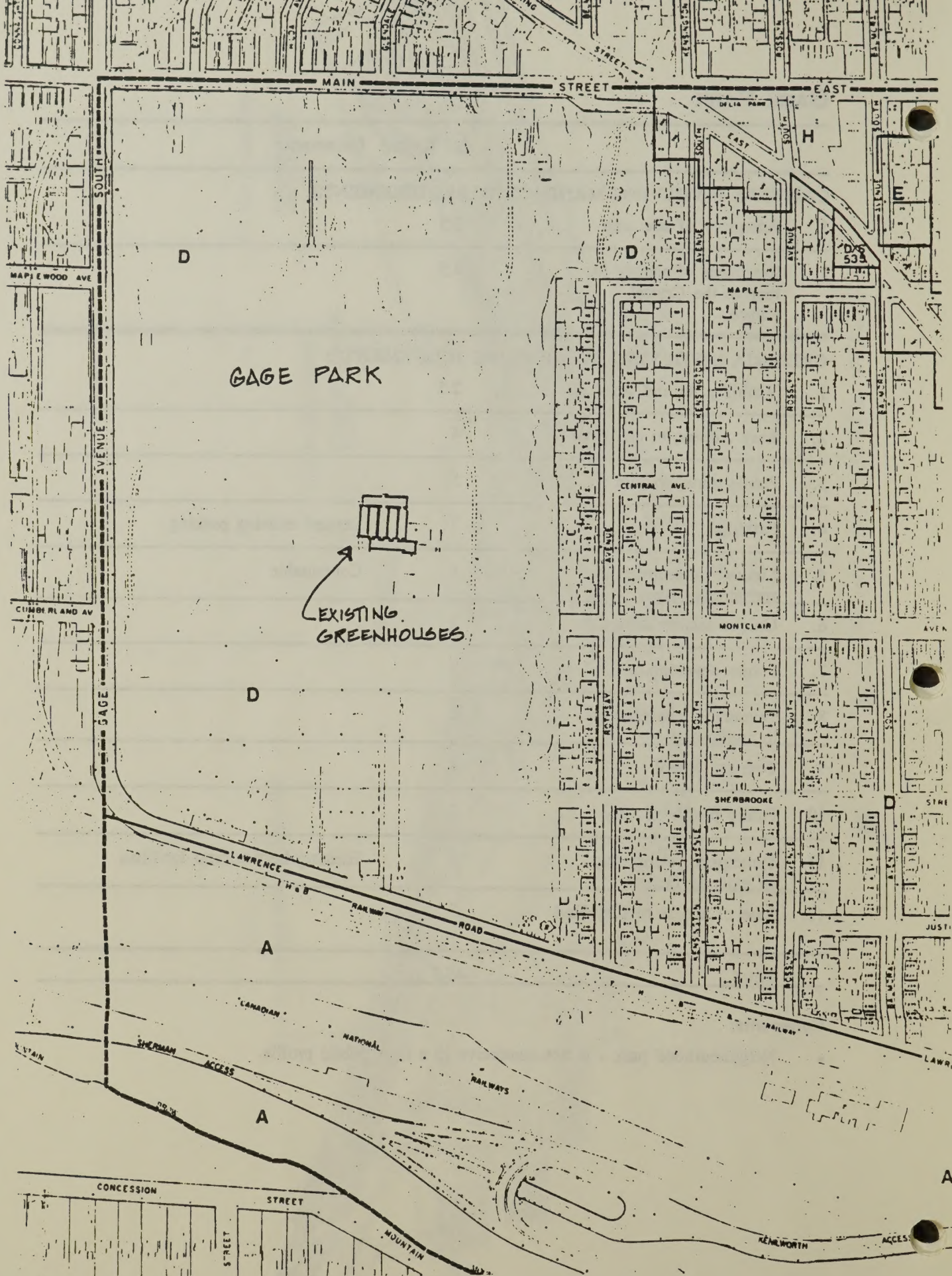


GAGE PARK

0-5 Rating Comments		
CRITERIA INVOLVING MANDATORY REQUIREMENTS:		
1. Adequacy of site area	3.5	
2. Readiness of agency to receive the Crystal Palace.	4.5	
CRITERIA INVOLVING DESCRIPTIVE JUDGEMENTS:		
1. Visibility, to and from	2.5	
2. Easy Access, to and from	4	
3. Public transportation	5	
4. Parking	3	Expand existing parking
5. Limited interruption to surrounding areas	4	Containable
6. Unique facility design	3	
7. Future development	2	
8. Favourable contribution to community	2	
9. Tourism appeal	3	
10. Public profile of City	2	
11. Synergistic relationship w/ existing facility	4	Existing horticultural facilities
12. Ease of access to City Hall	3	
Total	45.5	

Comments:

- Neighbourhood park - is not conducive to a high public profile.



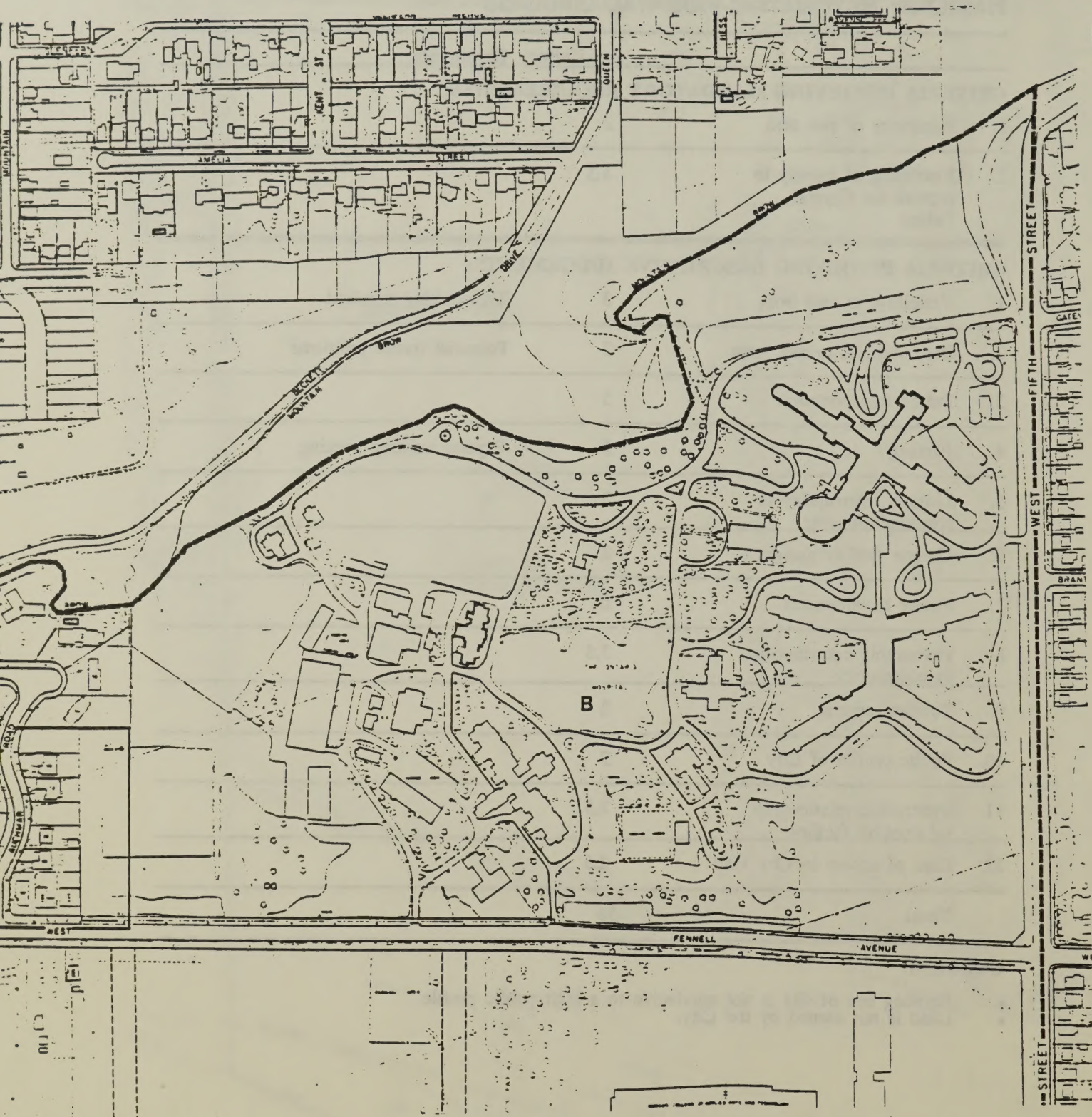
- CRYSTAL PALACE WOULD BE AN EXTENSION TO EXISTING GREENHOUSES

HAMILTON PSYCHIATRIC HOSPITAL GROUNDS

0-5 Rating Comments		
CRITERIA INVOLVING MANDATORY REQUIREMENTS:		
1. Adequacy of site area	2	
2. Readiness of agency to receive the Crystal Palace.	3.5	
CRITERIA INVOLVING DESCRIPTIVE JUDGEMENTS:		
1. Visibility, to and from	3	Tree cutting required
2. Easy Access, to and from	2	Potential traffic problems
3. Public transportation	5	
4. Parking	3	Expand existing parking
5. Limited interruption to surrounding areas	3	
6. Unique facility design	2	
7. Future development	0	
8. Favourable contribution to community	3.5	
9. Tourism appeal	2	
10. Public profile of City	2	
11. Synergistic relationship w/ existing facility	2.5	
12. Ease of access to City Hall	2.5	
Total	36	

Comments:

- Existing use of site is not conducive to a high public profile.
- Land is not owned by the City.



TURNER FARM

0-5 Rating Comments

CRITERIA INVOLVING MANDATORY REQUIREMENTS:

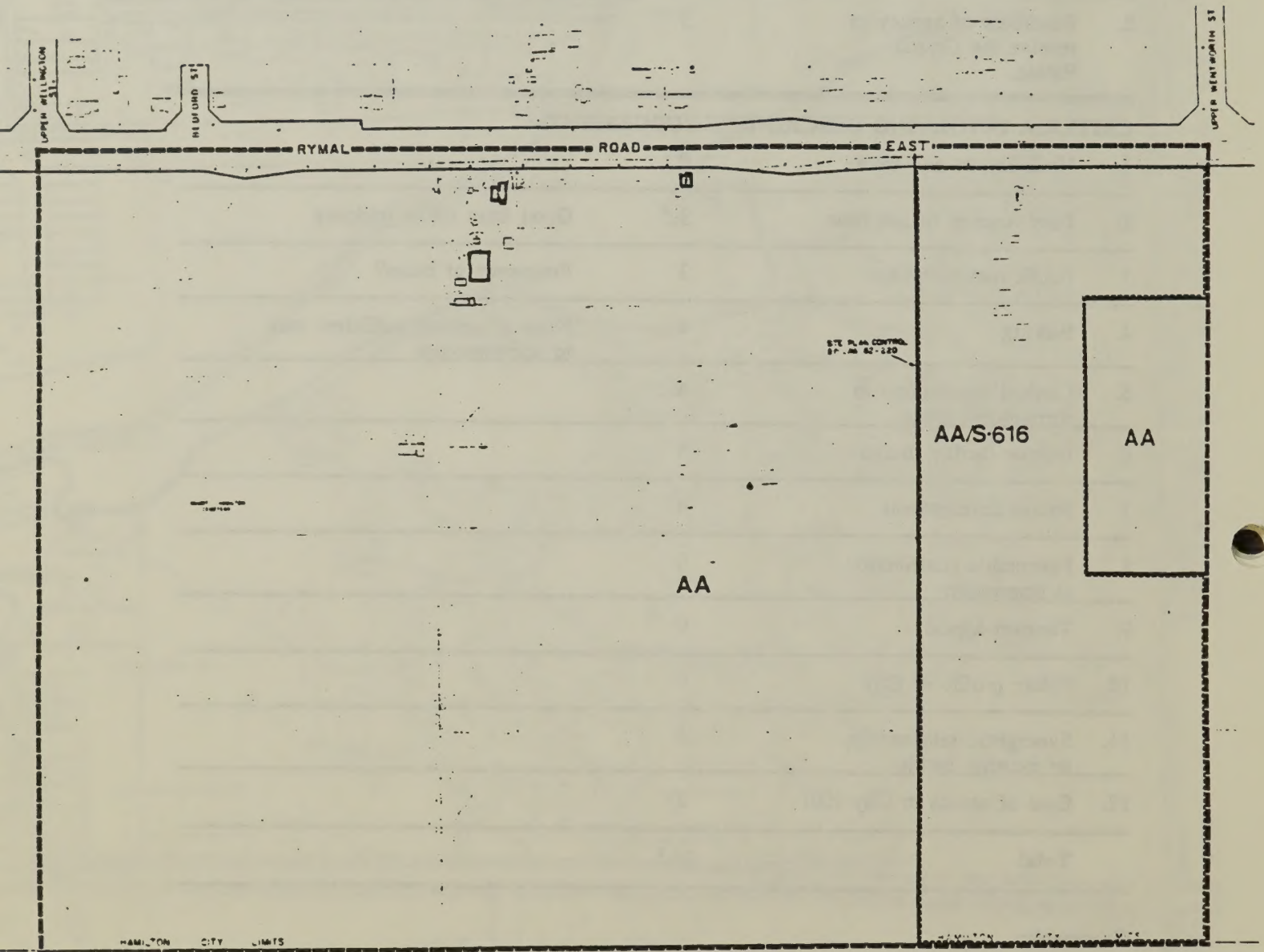
- | | | |
|----|--|---|
| 1. | Adequacy of site area | 5 |
| 2. | Readiness of agency to receive the Crystal Palace. | 5 |
-

CRITERIA INVOLVING DESCRIPTIVE JUDGEMENTS:

- | | | | |
|-------|---|------|---|
| 1. | Visibility, to and from | 0 | |
| 2. | Easy Access, to and from | 3.5 | Good from future parkway |
| 3. | Public transportation | 3 | Frequency of buses? |
| 4. | Parking | 4 | None at present, sufficient area to accommodate |
| 5. | Limited interruption to surrounding areas | 4 | |
| 6. | Unique facility design | 4 | |
| 7. | Future development | 4 | |
| 8. | Favourable contribution to community | 0 | |
| 9. | Tourism appeal | 0 | |
| 10. | Public profile of City | 0 | |
| 11. | Synergistic relationship w/ existing facility | 0 | |
| 12. | Ease of access to City Hall | 2 | |
| Total | | 34.5 | |
-

Comments:

- Rural location - is not conducive to a high public profile.



H E P C

H E P C

PRINCESS POINT

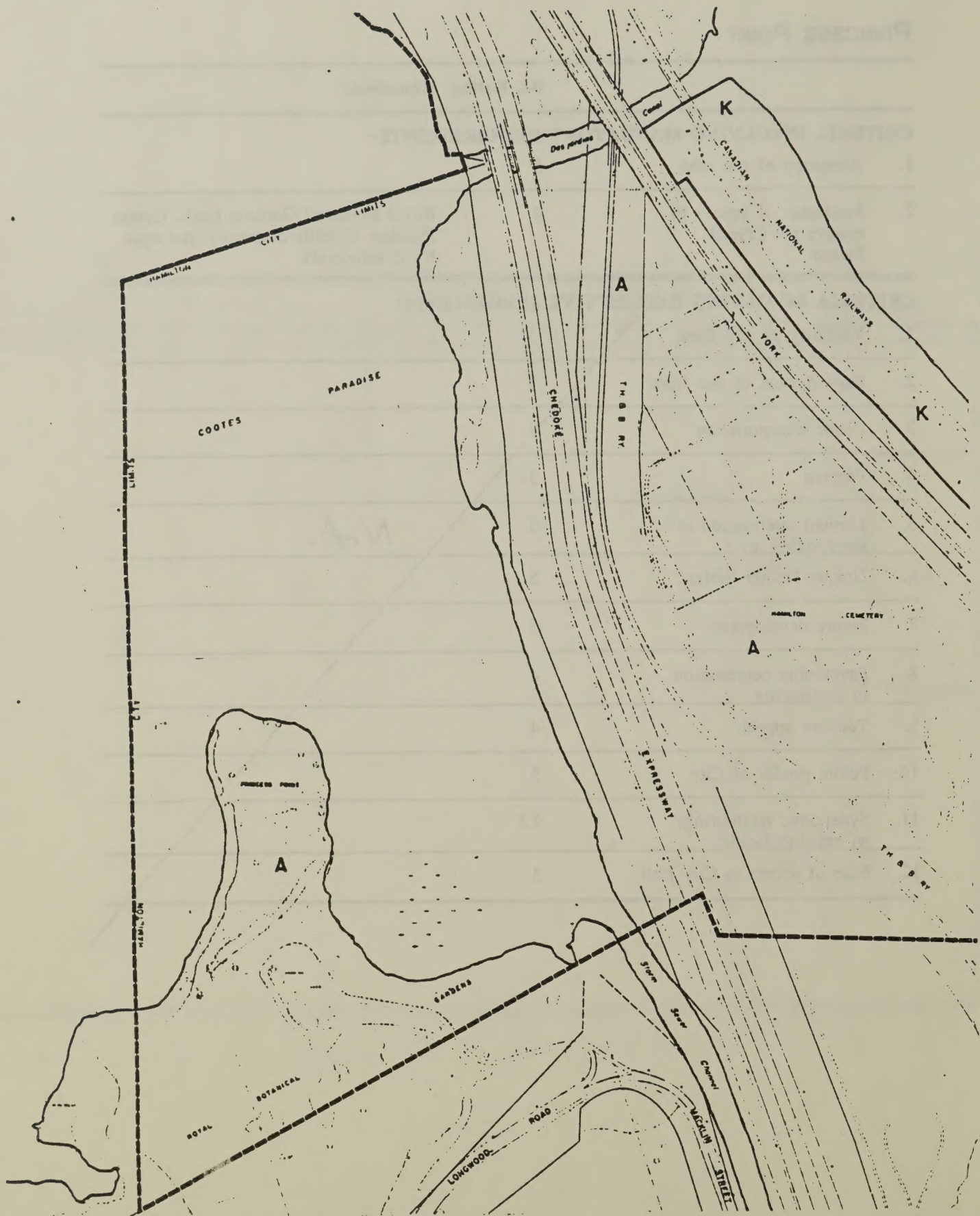
0-5 Rating Comments

CRITERIA INVOLVING MANDATORY REQUIREMENTS:

1.	Adequacy of site area	5	
2.	Readiness of agency to receive the Crystal Palace.	0	Royal Botanical Gardens lands, Cootes Paradise Wildlife Sanctuary, not open for development

CRITERIA INVOLVING DESCRIPTIVE JUDGEMENTS:

1.	Visibility, to and from	5	
2.	Easy Access, to and from	5	
3.	Public transportation	3	
4.	Parking	3.5	
5.	Limited interruption to surrounding areas	5	N.A.
6.	Unique facility design	5	
7.	Future development	5	
8.	Favourable contribution to community	4	
9.	Tourism appeal	4	
10.	Public profile of City	5	
11.	Synergistic relationship w/ existing facility	2.5	
12.	Ease of access to City Hall	3	



DUNDURN AND HARVEY PARK

0-5 Rating Comments

CRITERIA INVOLVING MANDATORY REQUIREMENTS:

1.	Adequacy of site area	2	
2.	Readiness of agency to receive the Crystal Palace.	0	Plans for restoration of Dundurn Castle grounds to original landscape.

CRITERIA INVOLVING DESCRIPTIVE JUDGEMENTS:

1.	Visibility, to and from	5	
2.	Easy Access, to and from	4	
3.	Public transportation	4	
4.	Parking	3	Expand existing parking
5.	Limited interruption to surrounding areas	1	
6.	Unique facility design	4	N. A.
7.	Future development	1	
8.	Favourable contribution to community	2	
9.	Tourism appeal	4	
10.	Public profile of City	4	
11.	Synergistic relationship w/ existing facility	3	Desirable to existing facilities?
12.	Ease of access to City Hall	3	

Comments:

- Existing users may not consider Crystal Palace complementary to their program.

SAM LAWRENCE PARK

0-5 Rating Comments

CRITERIA INVOLVING MANDATORY REQUIREMENTS:

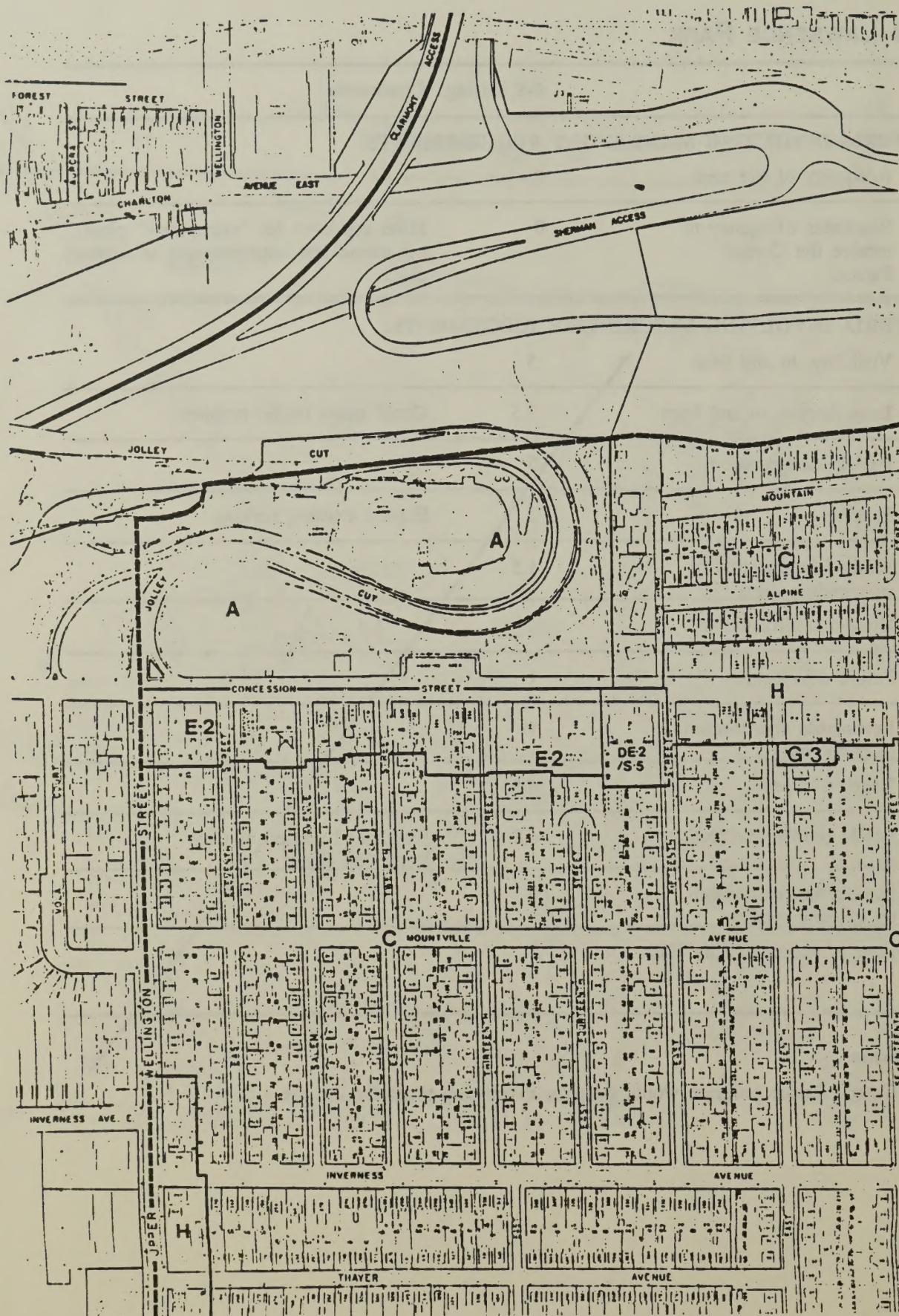
1.	Adequacy of site area	0	
2.	Readiness of agency to receive the Crystal Palace.	0	Plans approved for "escarpment" planting theme and improvements to existing park.

CRITERIA INVOLVING DESCRIPTIVE JUDGEMENTS:

1.	Visibility, to and from	5	
2.	Easy Access, to and from	3.5	Could cause traffic problem
3.	Public transportation	5	
4.	Parking	2	Expand existing parking
5.	Limited interruption to surrounding areas	1.5	
6.	Unique facility design	5	N. A.
7.	Future development	1	
8.	Favourable contribution to community	1	
9.	Tourism appeal	4.5	
10.	Public profile of City	4.5	Excellent Location as City Reception Room
11.	Synergistic relationship w/ existing facility	0	
12.	Ease of access to City Hall	3	

Comments:

- Crystal Palace program would overwhelm existing plans for the site.



FOOT OF JAMES STREET

0-5 Rating Comments

CRITERIA INVOLVING MANDATORY REQUIREMENTS:

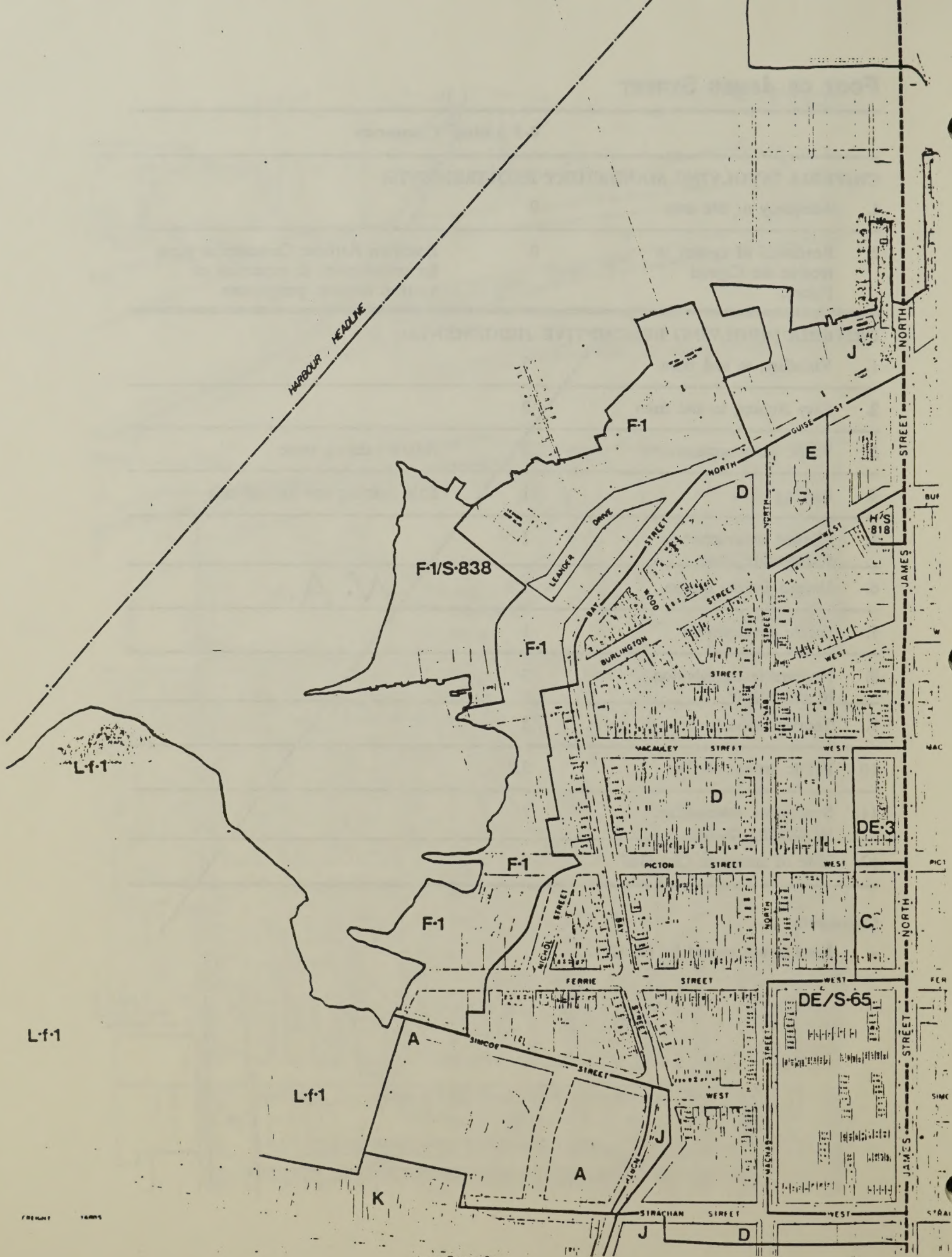
1.	Adequacy of site area	0	
2.	Readiness of agency to receive the Crystal Palace.	0	Hamilton Harbour Commission plans for continuation & expansion of nautical oriented programme.

CRITERIA INVOLVING DESCRIPTIVE JUDGEMENTS:

1.	Visibility, to and from	3	
2.	Easy Access, to and from	3	
3.	Public transportation	3	Adjust existing route
4.	Parking	1	little existing and limited area
5.	Limited interruption to surrounding areas	1	
6.	Unique facility design	3	N. A.
7.	Future development	1	
8.	Favourable contribution to community	2	
9.	Tourism appeal	3	
10.	Public profile of City	3.5	
11.	Synergistic relationship w/ existing facility	1	
12.	Ease of access to City Hall	2	

Comments:

- Land is not owned by the City.



MOHAWK ROAD EAST AT MOUNTAIN PARK / UPPER KINGS FOREST

0-5 Rating Comments

CRITERIA INVOLVING MANDATORY REQUIREMENTS:

- | | | | |
|----|--|---|---|
| 1. | Adequacy of site area | 5 | |
| 2. | Readiness of agency to receive the Crystal Palace. | 0 | Site is planned for sports related activities & expansion to Mohawk Sports Park |

CRITERIA INVOLVING DESCRIPTIVE JUDGEMENTS:

- | | |
|-----|---|
| 1. | Visibility, to and from |
| 2. | Easy Access, to and from |
| 3. | Public transportation |
| 4. | Parking |
| 5. | Limited interruption to surrounding areas |
| 6. | Unique facility design |
| 7. | Future development |
| 8. | Favourable contribution to community |
| 9. | Tourism appeal |
| 10. | Public profile of City |
| 11. | Synergistic relationship w/ existing facility |
| 12. | Proximity to City Hall |

N.A.

MOUNTAIN BROW PARK

0-5 Rating Comments

CRITERIA INVOLVING MANDATORY REQUIREMENTS:

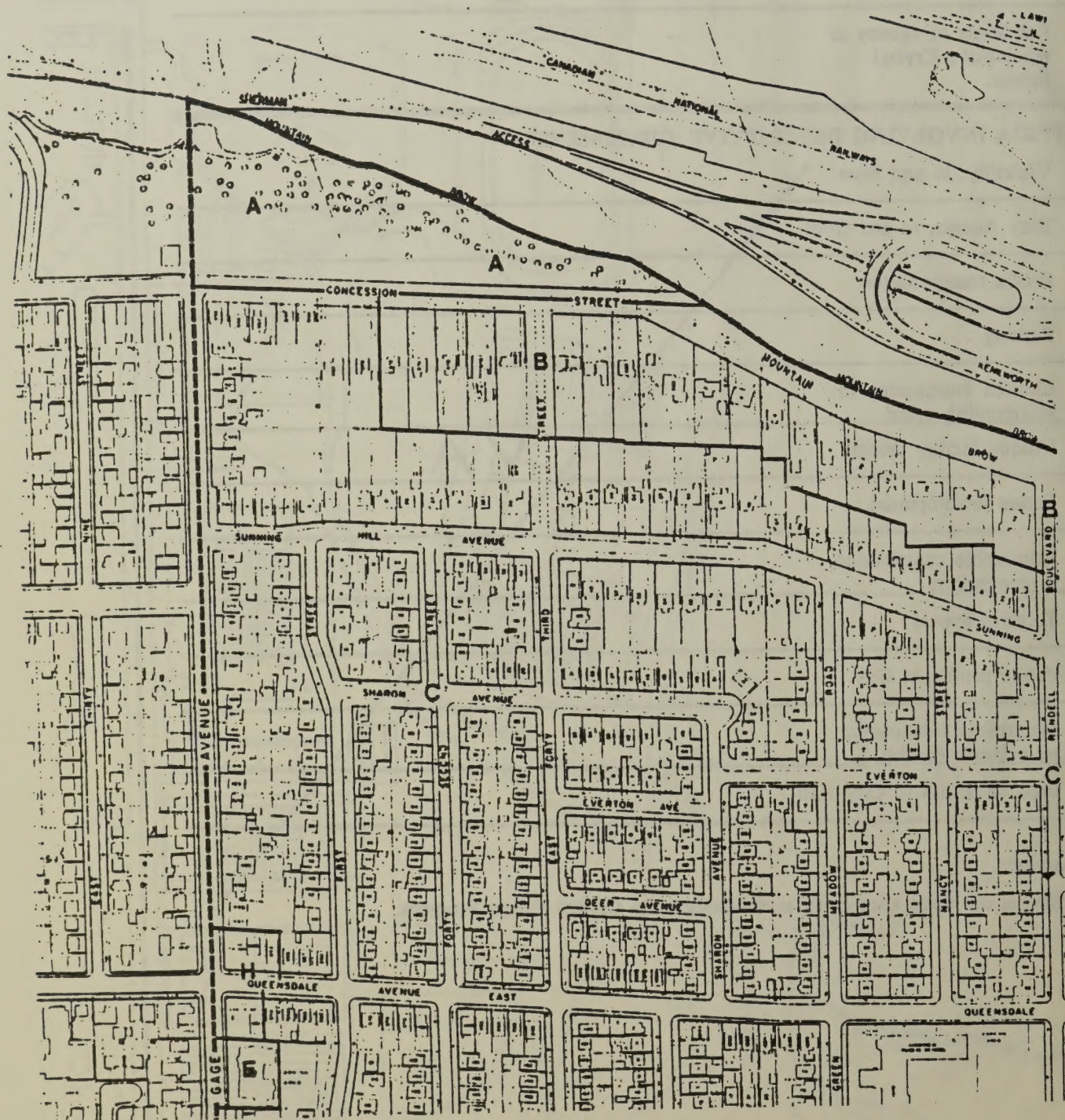
- | | | |
|----|--|---|
| 1. | Adequacy of site area | 0 |
| 2. | Readiness of agency to receive the Crystal Palace. | - |

CRITERIA INVOLVING DESCRIPTIVE JUDGEMENTS:

- | | | |
|-----|---|------|
| 1. | Visibility, to and from | |
| 2. | Easy Access, to and from | |
| 3. | Public transportation | |
| 4. | Parking | |
| 5. | Limited interruption to surrounding areas | |
| 6. | Unique facility design | N.A. |
| 7. | Future development | |
| 8. | Favourable contribution to community | |
| 9. | Tourism appeal | |
| 10. | Public profile of City | |
| 11. | Synergistic relationship w/ existing facility | |
| 12. | Ease of access to City Hall | |

Comments:

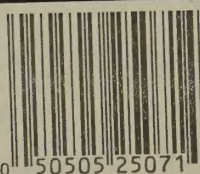
- Site is not large enough to accommodate the Crystal Palace Program.



HAMILTON PUBLIC LIBRARY



3 2022 21336000 7



0 50505 25071 4